ONTARIO ARTS COUNCIL
CONSEIL DES ARTS DE L'ONTARIO

RE-GENERATION

THE HEALTHY ARTS LEADER

Report on the
Ontario Arts Council's
Arts Management Conference

Plenary Sessions

February 6 and 7, 2005

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ONTARIO ARTS COUNCIL
CONSEIL DES ARTS DE L'ONTARIO

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PLENARY SESSIONS

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Executive Summary

In his welcoming remarks to the 312 participants who attended the Ontario Arts Council's (OAC) *Re-Generation: The Healthy Arts Leader* conference, John Brotman cited OAC's commitment to assisting arts organizations in building capacity and developing strength, by investing in human capital, as the reason for developing and hosting the conference. In partnership with The Samuel and Saidye Bronfman Family Foundation; the Ontario Ministry of Culture; the Ontario Trillium Foundation; the Department of Canadian Heritage; the George Cedric Metcalfe Charitable Foundation; and the Canada Council for the Arts, OAC was able to further the work it began in 2003 with the *Forum for Arts Specialists and Mentors* by providing professional development and networking opportunities to an even broader range of arts employees.

The conference schedule included plenary sessions in the morning and early afternoon of both days, with two subject breakout sessions offered on both afternoons. The plenary sessions on Sunday, February 6, 2005, included the following:

Nora Spinks of Work-Life Harmony Enterprises, lead speaker on day one of the conference, spoke on issues of "wellness, managing for wellness, modelling and mentoring healthy behaviours." Her focus on the diversities of the Canadian workplace offered all generations attending insights into each other's values and motivations regarding employment. That there are not enough workers to fill positions in the next decade is indisputable. The "nexus" and "velos" generations have been identified as committed to their work, under the right circumstances; they require more input and control over their work lives than their "boomer" predecessors. A trend identified by Ms. Spinks – based on the example of the Health and Safety Executive of England's "Stress Code" – is that the onus will be on all employers in the future to ensure that stress levels in the workplace are kept within reasonable limits.

The *Mentorship Strategy Discussion*, led by members Jean Malavoy and Sibyl Frei, of the Creative Management Project (CMP), was a working session to respond to the CMP's *Draft Mentorship Strategy for Managers and Administrators of Cultural Organizations*. The participants identified priority actions and stakeholders for the various objectives identified in the draft report.

Challenges in Professional Development was led by Bob Johnston and Susan Cohen of Cultural Careers Council of Ontario. Existing programs and suggestions from recent Chalmers Conferences were introduced followed by an offering of highlights of a soon-to-be-released report relating to training needs and resources in Ontario's cultural sector. Highlights include the definition and

enumeration of skill areas for cultural workers and the development and ranking of various learning formats as they relate to specific skills.

The plenary sessions on the second day of the conference – Monday, February 7, 2005 – included the following:

A recap of the peer breakout sessions that took place on the afternoon of Sunday, February 6, was done by facilitator Mary Rowe. Key points included these: the mentorship relationship must be defined clearly by both mentor and mentee; there is debate on the issue of accreditation for arts managers; Boards of Directors need to take a lead in human capital issues; and flexible work environments will be prominent in the future.

Andrew Taylor, Director of the Bolz Center for Arts Administration, was the lead speaker for day two of the conference. Andrew's speech was titled "Managing Metaphors" and suggested that "we may be reinforcing and entrenching the very problems we hope to solve" by relying on metaphors. Andrew went on to say, "Arts and cultural managers are in the *business* of metaphor, symbol, narrative and meaning. Why not engage more of that capacity in exploring the ways we describe and understand what we do?" Some of the metaphoric examples shared with the group include *Production and Consumption* – relating to the act of producing art and the audience consuming it; *The Fiscal Year* – is this an appropriate measure for what we do?; *Partnership* – "the term and the metaphor of partnership can often blind us to the connections that already exist.... We are really just recognizing a connection that already exists...."

A panel on succession planning was organized by the conference's Young Managers' Roundtable steering committee, based on their desire to see the issue addressed openly. Yvette Nolan of Native Earth Performing Arts Inc., Kim Tomczak of V tape, William Lau of Little Pear Garden, and Kathleen Sharpe of Ontario Cultural Attractions Fund each offered a précis of their experiences with succession planning. The question and answer period that followed concluded in a consensus that documentation and a strong narrative are useful succession planning tools. Another critical conclusion is that Boards of Directors must be encouraged to ensure the question of succession planning is always on the radar.

Rick Lash of the Hay Group facilitated *The Leaders' Journey*. In defining leadership excellence, Rick demonstrated various transitions that all leaders/heroes go through. Based on the work of Joseph Campbell, the six stages of the leader's journey include The Call; Preparation; Crossing the Threshold; Finding Support; The Road of Trials and Facing the Abyss; and finally Transformation and Return. Film clips from *Dead Poets Society, Shirley Valentine* and *The Lord of the Rings* illustrated various stages of the leader's journey.

There were six peer breakout sessions on the afternoon of the first day. The delegates worked in cross-sectoral groups, with others who had close to the same number of years' experience. Each group was asked to discuss a topic that related to their demographic group.

The later breakout session on Sunday afternoon and both of Monday's breakout sessions were made up of 18 individual topics relating to human resources in arts organizations. Some sessions offered hands-on tools while others were of a more exploratory nature. Subject breakout sessions were the following:

1. Managing Change – New Tools for Managers
2. Arts Management 101
3. Exploring Partnerships
4. The Changing Face of Arts Organizations
5. Performance Management
6. Developing a Compensation Strategy
7. Organizational Self-Evaluation – Aboriginal and Culturally Diverse Arts Practices
8. The Value of Mentorship
9. Surviving Transitions
10. Occupational Health and Safety
11. Dealing with Challenge and Conflict
12. Organizational Self-Evaluation
13. Generational Diversity in the Arts
14. Working in Crisis?
15. Cluster Management
16. Designing and Implementing an Internship Program
17. Recruitment and Selection
18. Human Rights

Session leaders for the subject breakout sessions were drawn from both the arts and the HR sector.

The conference closed with an open-microphone session, allowing delegates to share their observations and concerns.

Plenary Sessions – Sunday, February 6, 2005

Summary of Nora Spinks's speech

Mary Rowe, the conference facilitator, introduced one of the conference focuses, which would be the making of connections between the "elders" in the arts sector and its newcomers and how the entire Canadian workforce is faced with these issues. Mary then introduced lead speaker Nora Spinks.

Nora outlined her topic: "wellness, managing for wellness, modelling and mentoring healthy behaviours" to take back to our respective workplaces to "demonstrate what healthy leadership is all about." She summarized data pertaining to the "Nexus" and the "Velos" generations, Nexus being those currently between 25 and 34 years of age, the generation that forms the nexus between those born before and after the development of the internet; and Velos being those currently between 16 and 25 years of age, named for the speed at which they embrace change. Nora affirmed that today's workforce is a blending of multiple generations; where historically there was a sequential hierarchy, today we often have older generations reporting to younger generations. The underlying theme of work-life harmony is essential to develop effective management strategies to encompass all the trends in today's workplace.

As background to her speech Nora reminded us that

- As healthy leaders it is essential we understand "the significance of the diversification of the workforce: age, gender, culture and generations."
- The worker shortage is here – we won't be able to replace the workers that are expected to leave the workforce.
- A change in the age of mandatory retirement will not solve the worker shortage problem because people are pushed or pulled out of the workforce for various reasons, including burnout, health and family commitments.
- As leaders in our fields, we need to deal with the issues workers face in order to keep people in the workforce.

In pointing out that we might ask ourselves why we need to deal with these issues, Nora reminded us that the monetary consequences of inaction are seen in very hign recruitment and training costs as well as continued turnover. We also need to realize that the talent we are seeking in the arts sector is also being sought globally in other sectors. The concept of "Development" as a strategy in HR planning is essential in creating dynamic and healthy organizations, no matter what generation we are considering.

The Nexus generation will not sell their soul to their work; although they do not lack in passion, they have a very clear sense of balance between their work and personal lives. Referring to an October 2004 study, *Generation and Gender in the*

Workplace, published by Families and Work Institute, Nora identified three distinguishing features of the generation of new, young leaders:

1. There is "less gender differentiation than ever before," and the work expectations and demands for balance are the same for both men and women.
2. They are more likely to be family-centric than preceding generations.
3. They are not interested in assuming roles of increased responsibility without the support and resources to do a good job and meet the commitment; they will not threaten their personal, professional or spiritual self for their work.

All of these features are substantiated by the increased number of men taking paid parental leave.

Offering "a little bit of insight," Nora demonstrated that in order to better understand and interpret people's behaviour in the workplace, we need to remind ourselves of their childhood experience and what they were exposed to in the formative, impressionable period of 9 to 13 years old. It is in these years that the core of who we are and the foundation for our work expectations are formed. With the help of delegates, a quick picture of the Nexus and Boomer generations was drawn:

In Toronto	**Nexus Generation**	**Boomer Generation**
In formative years, were exposed to:	• First Iraq war, war in the living room • Recession and lay-offs • Parents unable to predict their future • High divorce rate and beginning of co-parenting	• Stable jobs • Divorce with sole custody with visitation rights
What told about work:	• Multiple careers • Learn for life • Constant change is normal	• Job for life • Work hard and you'll do well
Attitude to work:	• "Work sucks" • "Co-workers are idiots" • "Bosses are jerks" • First jobs in service industry • Shorter term of commitment	• Long-term commitment

Once we have this "insight" into better understanding people in our workplace, we must ask ourselves what more do we need to know and how do we leverage this information. Both the Boomer and Nexus generations are seeking a values fit with their organizations. The Nexus generation is characterized by being very independent – being the first latch-key generation; being from smaller families; having the ability to multi-task; and being considered creative and expressive. Knowing these things, we can endeavour to mix the various generations appropriately in work arrangements in order to create healthy work environments.

"The more you understand about demographics and where some of these behaviours come from, the easier it will be for you to manage the folks around you."

Although arts work is not ranked high for young people (from 17 to 30 years) as preferred work, there is a correlation between the values identified by young people as important and those sought by arts employers.

In addressing the issue of retention, Nora made the point that workload is the number one concern for all generations in the workforce. Based on the formative experience or history, each generation has a different approach and attitude to being asked to do more with fewer resources. Where the Boomers might work harder and longer, the Nexus generation will not. We need to create environments that recognize the limitations of employees and make allowances for them.

The Velos generation is used to easy access to speedy methods of communication, so we need to adapt and change many elements of our work environments, including work design, workload allocation, methods of communication and career and time structure. For the Velos generation, face-to-face encounters are reserved for personal and social purposes; they are not considered necessary in the workplace. In the re-thinking of our work environments we need to be aware that time is a commodity to be bought and sold, but again, it has different meanings to different generations.

"The Nexus and the Velos generations will give you 150 percent when they are there. They're just not going to be there 24/7.... They know how to manage 24/7. They know how to balance their own time and their relationships. They know that you'll never be done...."

Nora identifies the Velos generation as a group committed to the people they work with, not necessarily the organization they work for. This generation moves in packs. Their loyalty goes to those who treat them fairly and whom they

respect. Environments that cultivate and allow these relationships to be developed are essential for success.

Delving deeper into the differences between generations and their response to the workplace, Nora solicited the following from the delegates:

	Boomers	**Nexus**	**Velos**
Parent/child relationship	• Don't ask • Do as told • Discipline by punishment	• Limited parental time • Responsible • Negotiation • Discipline by consequences	• Discipline by negotiation

When the Nexus and Velos generations enter a workforce full of rules, their instinct is to negotiate. A Boomer's response to this might include questioning their level of commitment or their own ability to trust an employee. We must recognize and find strategies to work with the Nexus and Velos generations' instinct to negotiate, while balancing each generation's expectations.

A concept that has changed over the last few decades is that of breaks. Traditionally, we were schooled, we worked and we retired. Today, those three activities are all mixed in at various times in our lives. The challenge faced by managers is not knowing when to expect breaks from employees. Nora identified four "bargaining chips" that can help in the management of people:

1. Time.
2. Training and Development: The current standard for Training and Development is 1.5 to 2 percent of your organization's HR budget. That norm is expected to increase in the next five years owing to the "learn for life" characteristic of the Nexus generation. If an organization does not give them the resources to succeed or offer appropriate challenges, people will move on.
3. Feedback: Both the Nexus and Velos generations thrive on instant and detailed feedback. They grew up with very detailed report cards and if they don't receive adequate feedback they think you don't care. Their feedback should be "fast, frequent, complete, concise, direct, with reasons and rationale."
4. Clear work assignments: The more thorough and well thought out a work assignment is, the greater the chance it has of getting done.

Dealing with various generations simultaneously in the workplace requires both great care and the use of different techniques for each generation in order to match their needs. The key to this challenge is creating an environment of fairness. Treating people and generations differently is acceptable, providing

there is a perception of fairness. Nora pointed out that this challenge requires both attention to detail and emotional intelligence. "It's this kind of environment that will magnify the good. The better manager you are, the more extraordinary you will look in this environment. The poorer you are as a manager, that too will be magnified." For success as a manager dealing with these issues you must model behaviour and follow through on everything you say with action; otherwise you will be dismissed by the younger generations, and they will not perform for you.

"The management vacuum is becoming one of the biggest challenges for executive leadership across all sectors."

The number one reason that people don't want to go into management is the example they currently see of bad managers: working long hours, receiving no recognition, being overstressed and burning out. Although the next generations of potential managers want to work, assuming roles and responsibility, they don't want the kind of life that is currently being modelled. Nora cited the school system as facing a serious shortage of vice-principals in the next few years, causing school boards to have to restructure their entire systems because of a lack of people willing to manage. All sectors are facing this same problem.

"We need to model behaviours that are going to excite people, not turn them off."

In conclusion, Nora offered the following strategies to encourage employees to stay:

1. Show respect. Listen more than you talk and conduct yourself in the way you would like others to behave.
2. Create flexibility, particularly for younger workers.
3. Offer guidance and encouragement, giving younger workers direct access to decision makers.
4. Remember the characteristics of the Nexus generation – the personal is public, global, mobile, fast – and satisfaction is key.

Organizations that have a healthy work-life approach find they need to recruit less often. If we believe that we need to work until the work is done, we'll never stop. Organizations, although restricted by some legislated deadlines, can change, control and set reasonable deadlines.

Q&A: Discussion Period – Nora Spinks

The following are comments and insights that were raised during the discussion period:

- In order to balance the needs of the Nexus generation and provide customer service we must, with all stakeholders involved in negotiations, allow people to push back, creating healthy parameters. Whereas the Boomer generation is a proponent of "the customer is always right," the Nexus generation feels that customers deserve excellent service and quality, but they are not always right.

- Nora shared the "How Are You?" test to determine how close to the edge one's staff might be. As the question "How are you?" is one of social protocol, we tend to ask and answer it as if no one is really listening; replies, therefore, are often not masked and delivered from an honest place. The replies are based on a five-point scale:
    1. In degrees of wellness.
    2. In degrees of how busy one is (this is the first phase of chaos).
    3. In degrees of exhaustion, stress and burnout.
    4. "I'm not sure" – a sense of being disconnected from oneself.
    5. "OH, JUST FINE" – with sarcasm, hostility and anger, being past the saturation point.

  It is important to recognize when staff are reaching the saturation point and put preventative measures in place as "presenteeism" is more dangerous than "absenteeism." Presenteeism reflects employees who are emotionally not engaged and can potentially cause a ripple effect.

- The necessity and implementation of healthy work-life practices will be expedited by
    1. the demands for balance made by the Nexus generation,
    2. funders and foundations experiencing the same issues,
    3. societal perspectives.

- The Health and Safety Executive in England has implemented a Stress Code, whereby all employers must ask all employees a series of questions relating to workplace stress. Employers must reach certain thresholds or face penalties; success rates will be awarded incentives. This program is receiving attention in the E.U. and the ideas will spread to the U.S. and Canada.

- In dealing with contract or temporary employees and salaried positions it is necessary to match the various types of work available to the people. Managers require enormous awareness to "facilitate this sort of relationship building."

- Although the Nexus generation has high compensation expectations, many trade-offs can be negotiated:
    1. Opportunities for personal and professional development.
    2. Opportunities for increased responsibility.
    3. Access to decision makers.
    4. Access to mentoring relationships.
    5. Flexible time arrangements.

- Where we came through the 1980s and 1990s working faster, harder and smarter, we now need to find ways to work "wiser, deeper and richer"; otherwise we will implode. This will require open dialogue with boards, funders and staff to identify and eliminate
    1. low-value work,
    2. low-impact initiatives,
    3. trade-offs made by all.

In closing, Nora shared this quote from Charles Darwin:

"It is not the strongest species that will survive but that which has the greatest capacity to adapt."

She asked us to "think about your organization and what you are doing to adapt to the changing work environment."

Mentorship Strategy Discussion

Jean Malavoy and Sibyl Frei facilitated this session. Jean provided background information on the Creative Management Project (CMP) and introduced the goals and objectives of the *Draft Mentorship Strategy for Managers and Administrators of Cultural Organizations*. The following are the results (provided by Sibyl Frei of CMP) of the working session, designed to confirm the project's objectives, prioritize proposed activities and suggest who should take the lead on the selected priorities. After an opportunity to discuss the objectives and activities in small groups, one representative from each table briefly summarized the group's comments.

Goal: The goal of the mentorship strategy is to increase support for and involvement in the mentorship of managers and administrators in the cultural sector across Canada.

Objective 1: To promote mentorship of cultural managers and administrators, and the mentorship strategy itself.

The priority actions supported by the conference participants were the following:

- Advocating for a sustainable model for the funding of mentorships for managers in the cultural sector, including supporting longer-term relationships and developing more second-in-command positions.
- Strongly encouraging more funders of cultural organizations to include support for mentorship in their programming, and to broaden existing program criteria to include mentorship of mid-career and senior managers and longer-term mentoring relationships.
- Promoting mentorship as an important and achievable component of succession planning, and the development of healthy organizations and leaders in the sector, and encouraging more cultural organizations to support mentoring by their employees.
- Building a commitment within the sector for varied and flexible delivery of mentorship to meet diverse needs and address varied circumstances across the country.
- Continuing to build links with formal education, training institutions, internship deliverers and others offering professional development.

Other key points noted regarding objective 1 were these:

- The mentorship strategy needs to be long term – at least 10 years.
- The whole sector to needs to recognize the importance of passing their experience on to the next generation, contributing to mentor development, and sharing information through mentoring.
- Funders need to follow the process of implementing the mentorship strategy, not lead it.
- Funders need to look at removing barriers to mentorship support, for example by allowing students in arts management courses to access

government internship and mentorship programs, or by extending support for publisher mentoring to other parts of the sector.

- Funding for mentorship should include developing models and tools for mentoring; developing and operating a national talent bank of mentors; recruitment, training and development of mentors and mentees; and time for project consultants to mentor organizational staff.
- Alternative mechanisms for mentorship funding could include establishing a funding collective, where some funders focus on short-term objectives and others focus on longer-term ones in the implementation of this mentorship strategy.
- Support for mentorship should not come out of existing operating funds for cultural organizations, especially given the many problems and issues faced by cultural organizations.

Objective 2: To undertake research on issues related to mentoring of managers and administrators in the cultural sector, and develop effective mentorship training models and tools suitable to the cultural sector.

The priority actions supported by the conference participants include the following:

- Models for mentorship training that reflect best practices, address critical success factors in mentoring relationships, and include strategies for integration with other forms of professional development.
- Sector-wide mentorship skills and training gaps, and mechanisms and priority-setting to fill those gaps, leading to the development of mentor competencies, selection criteria and compensation, and an understanding of the factors associated with motivation and rewards in mentoring relationships.
- Evaluation models for formal and informal mentorship programs.
- Mentorship training tools and templates.

Other key points noted regarding objective 2 were these:

- Learn models, best practices and tools for mentorship from other sectors, including from the for-profit sector. Some examples of successful models include CAPACOA's mentorship program, the Community Futures Development Corporation for its delivery in isolated communities, and the Association of Fundraising Professionals.
- Develop a range of models for implementing the mentorship strategy, including formal and informal, one-on-one, peer-to-peer, tri- or pyramid, group, and online mentoring. Note that peer mentoring is very important, particularly for younger workers.
- Best practices need to include the practical: what was done, what worked, and what didn't.
- Consider developing a barter system for mentoring between organizations, to offset lost staff time in the mentoring organization.

- Involve mentees in designing how mentors and mentees are matched in geographically or culturally isolated communities, including the development of an online community or mentorship support resource and database.
- Mentorship training should involve both mentors and mentees, and include identification and recruitment of mentors, criteria and processes for mentor and mentee selection, guidelines to avoid burning out mentors who are called upon often, how to structure a mentoring relationship, how to be a good mentor, how to clarify expectations on both sides from the beginning, how and what a mentor will learn, and how to make effective use of time.

Objective 3: To support varied and flexible regional and local delivery of mentorship programming.

The priority actions supported by the conference participants were the following:

- Establishing a very small secretariat to link mentorship efforts around the country and keep the momentum building for the mentorship strategy.
- Supporting the development of different delivery programs and approaches in regions and communities in accordance with the points outlined in the principles.
- Involving arts service organizations in facilitating linkages between mentors and mentees.
- Building a support network that accommodates mentors and mentees at all stages of their relationships.
- Allocating increased financial support for mentoring in geographically and culturally isolated communities to allow for matches from one region to another and ensure that some face-to-face time can be incorporated into those mentorship activities.

Other key points noted regarding objective 3 follow:

- Local and regional arts service organizations (ASOs) should take the lead on delivery, partnering with funders in their regions.
- Put funding and mentors in place, and then each community can identify the type of mentorship it needs; allow for a custom fit for each organization.
- Consider including international connections for mentorship relationships.
- Mentorship should include individuals in one organization being mentored by individuals in another, and mentorship for artist-run organizations.
- Delivery could include national and regional networks, in-person roundtables to help people find mentors, initial meetings for forming mentorship pairs, dialogue forums about arts management issues, and face-to-face and online mentorship follow-up.
- Many suggestions about where the secretariat should be housed were made: CCA only, CHRC only, a joint initiative of CCA and CHRC, HRSDC, Canada Council and Charity Village.
- Leadership of the secretariat should be a panel or advisory body, representing diverse disciplines, organizations, communities and cultures to

build buy-in at the national level, and should include organizations not funded by the Canada Council.
- Secretariat should include multi-generational staff and contract people who come from different backgrounds, viewpoints and geographical regions.

Objective 4: To provide national coordination, communication and information-sharing.

The priority actions supported by the conference participants were the following:
- Coordinating activities in support of varied and flexible regional and local delivery of mentorship programming.
- Facilitating the matching of mentors and mentees, especially in geographically or culturally isolated communities.
- Reaching out to the large pool of potential mentors in the cultural sector who are not actively involved in mentoring at present, and other potential mentors in other parts of the non-profit sector and from other sectors.
- Supporting the development of training models, resource materials and tools, the provision of training in mentoring as needed, and evaluation.
- Supporting the development of online coordination, technologies and mentoring communities, and, in the process, developing a searchable database of questions and answers available to others.

Other key points noted regarding objective 4 were these:
- In addition to more traditional face-to-face mentoring relationships, develop online mechanisms to allow mentors and mentees to connect and learn. Use e-mail and online communication tools to coordinate delivery, share resources, connect mentors and mentees. Look at establishing lunch-time forums where administrators can sign in online and chat at a specific time each week.
- Develop electronic tools that are accessible via the Internet, including a national database of mentors, and the kinds of projects, organizations, and skills they've been involved in, a database of what worked and what didn't, so there is a Web resource for people to look for information rather than having to ask their mentor, and a database of useful tools for mentoring. These tools should be able to be adapted by large and small organizations.

General Comments:
- Add a definition of mentorship to the strategy, so that everyone understands what the strategy is trying to promote.
- Addressing regional, organizational and cultural issues should be part of the context for mentorship in the Canadian cultural sector.

Lessons Learned from the Cultural Sector
- Mentorship needs to occur over time, not in a three-day visit.

- It is important to build recognition that mentorship is a two-way process in which both parties gain, and that mentorship does not involve only younger people learning from older people.
- Personality matching is very important; matching on paper does not necessarily work.
- Mentors need to be sensitive to the needs of the organizations with which they work.
- Mentoring relationships need some contact every week (e-mails, phone calls ... small amounts of time).

Challenges in Professional Development

This session was hosted by Bob Johnston and Susan Cohen of the Cultural Careers Council of Ontario (CCCO). Bob began by introducing the CCCO mandate and activities relating to career accessibility and advancement for culture workers in Ontario, highlighting in-career professional development and on-the-job training as priorities by means of AIM (Apprenticeship, Internship and Mentorship).

In discussing professional development, one must look to the work of the Creative Management Project, which led to discussions at the Chalmers Conferences in 2002 and 2003 and which were dominated by human resource issues. We are seeking practical solutions to advance the subject of career development in the cultural sector.

The following are some of the suggestions made at the 2002 Chalmers conference:

a. By Marie Lalonde:
    - Remain flexible in managing employees (flexible hours, respect for home and family life).
    - Initiate internships across the country and abroad to expand knowledge.
    - Encourage exchanges between large and small institutions within a community.
    - Introduce programs to improve employee morale and creativity.
    - Ensure arts management courses respond more directly to the needs of the sector.

b. By Jocelyn Harvey (these are suggestions she had gathered in her research):
    - Having a younger manager shadow a senior manager for the cycle of the organization's work, following which the senior manager would take a sabbatical, leaving the younger one in place.
    - "Sanity circles" where managers gather to provide support and peer-to-peer networking opportunities, as well as professional development seminars.
    - With funding, place assistants to cultural managers of arts organizations for career mentoring. This was done in Quebec and most led to permanent positions.
    - Have a senior manager nearing retirement pair with a young manager, working together over the period with the senior manager passing on skills and expertise. As the senior manager starts to bow out of the organization, the younger one assumes more and more responsibility for the job.
    - Funding agencies should ask organizations to table human resources plans, as approved by their boards, indicating how they are planning for succession and investing in staff professional development.

c. A general conclusion:
    - Internships are restricted in length and criteria.

The 2003 Chalmers Conference identified three obstacles in 1the cultural management crisis: time, money and attitudes. In order to address the issue of attitudes, we need to make professional development a priority "in the battle for resources to produce artistic work." Eighteen recommendations were made in the 2003 CMP report, many of which have already been acted on:

a. Human Resource Management Tool Kits created by CCCO and Cultural Human Resource Council (CHRC).
b. Action on mentoring by CCA and CHRC.
c. More emphasis on HR by funding agencies.
d. Publication and dissemination of CHRC's *National Compensation Survey* and *Building on Success*.

Bob introduced Susan Cohen to discuss recent CCCO work relating to training needs and resources in Ontario's cultural sector. Susan identified several challenges in dealing with professional development:

a. As freelance workers, many cultural workers are ineligible for public funding for training, putting increased pressure on trade or arts service organizations to assist.
b. Information is unevenly distributed.

c. Diversity of the sector and individualized nature of cultural careers makes it difficult to standardize professional development and training.
d. In prizing artistic and creative skills, we sometimes don't focus on other areas also requiring development.
e. We need to retain the Nexus generation in the cultural workplace.

The CCCO developed Career Initiatives in Culture, a large-scale capacity-building program, funded by CHRC, which ran three times. "The programs were intended to strengthen the cultural sector's capacity to address skill development for professionals. The various projects promoted better resources in the community through improved information, materials and tools or networking." Concerned about the long-term effectiveness of this program, the CCCO, in 2002, examined the results and discovered duplication of projects and information, lack of access to existing data, and a lack of coordination relating addressing the issues of and funding for professional development.

The CCCO then embarked on a research program to analyze professional development from a practical perspective, asking "What information and skills do professionals working in culture need and where can you acquire them?" The first phase of this project was commissioned by the Ministry of Culture; the result will be a study to be published in the near future. The following are highlights from the report:

- Definition of ten skill areas for cultural workers.
- Enumeration of specific skills for the ten skill areas.
- Development of list of possible learning formats:
    a. Short courses (1.5 days).
    b. E-learning of various kinds.
    c. Experiential programs (coaching and AIM).
    d. Customized training opportunities.
- A survey to identify ranking of particular skills necessary for training and best learning formats.
- Areas identified as having the greatest need for professional development are leadership, career planning, using volunteers effectively, and personal negotiating. Availability and accessibility to these four areas is considered problematic.
- Learning formats that include networking and experiential experience were identified as the most beneficial.
- The next phase of this research has been supported by the Ministry of Training, Colleges and Universities, to consider skills in more detail.

The study should result in a consolidated resource of the following:

- The skills identified by Ontario's cultural workers as being the highest priorities for professional development.

- Where the skills can be attained, in the appropriate formats for individual circumstances.
- Identified gaps and solutions for those gaps.
- Plans of how best to work with our existing information and professional development network – ASOs, unions, government agencies and others – ensuring that information is distributed as evenly as possible provincially and throughout the sub-sectors.

Bob Johnston closed the session by recognizing that although there is great value in the work that has been done to date, there is still a great deal more to be done. Although most would agree that more financial support to better pay human resources will help to address a crisis in the industry, we all know that the money is not coming fast. In advocating that there are other solutions, Bob suggests that we can better invest in human resources with confident leadership delegating and allowing staff to take chances and make mistakes, while sharing experience and knowledge. Leaders need to maintain and improve their skills in order to be able to allow for successorship.

In answer to his question "What can we do?" Bob identified the following options:

- Ministry of Training, Colleges and Universities: although there are no apprenticeships dedicated to the cultural sector, there are signs of more flexible approaches; a wage subsidy approach would be beneficial in the not-for-profit sector.
- Setting aside a small percentage of our annual budget for professional development of all staff.
- Encouraging the trend that arts funding agencies are building HR management concerns into their funding criteria.
- Lobbying HRSDC to revise internship funding criteria to be more suited to the realities of the cultural sector.
- CCCO's dream: to develop an arm's length fund dedicated to training and in-career professional development in the cultural sector.

Q&A – Challenges in Professional Development

During the discussion period, the following comments and insights were shared:

- The arts industry is resilient. Its members may migrate to other sectors, but often return. When labour force numbers are dropping in other sectors, they are stable or rising in the arts.

- The need for both hard (information-based) and soft (emotional, relationship-based) knowledge is common to all generations, although each generation may approach them differently. The challenge lies in how we build strategies to deal with these two different types of knowledge. Although there is a distinction between them, they are not in conflict.

- Although there are programs and services that encourage multiculturalism and provide funding for diverse cultures, the question of how culturally diverse artists can be integrated to one Canadian culture still remains unanswered

Plenary Sessions – Monday, February 7, 2005

Recap of Peer Breakout Sessions

Having met with the peer breakout session leaders following their sessions on Sunday afternoon, Mary Rowe synthesized their comments into the following highlights (specific peer breakout session reports are available in the Breakout Session segment of the report.)

- Relationships are what keep people in the arts sector. More formal terms for relationships include mentorship and leadership development.

- Both mentors and mentees must be responsible for defining their relationship.

- On the subject of credentialing or accreditation, there was debate on whether the profession should seek some form of accreditation. The argument for is that it would add legitimacy and the argument against is that it would introduce an inflexibility.

> *"Some form of credentialing would be a means of setting some work-life balance standards."*

- Boards of Directors need to take more responsibility and leadership for human resource issues, particularly succession planning.

- Flexibility of work style is essential as an increasing number of future jobs in the sector will be of a non-institutional nature. Encouraging flexible working conditions will assist in making allowances for this transition.

- Unlike many other sectors, the arts sector seems to not provide rewards for its long surviving members. The question of whether we need to institute an intentional reward system was raised. Regarding models: are there elders who have thrived and what are their lessons and what can we learn from other sectors?

Andrew Taylor's Speech

"Managing Metaphors"

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All keynotes are supposed to begin with a joke, so here is mine. Forgive me if you've heard it before, but it has a larger purpose that we'll get to soon:

> Sherlock Holmes and Doctor Watson are out in the woods on a camping trip (as was so common in their time). In the middle of the night, Sherlock Holmes shakes Doctor Watson awake and says to him, "Watson, look up at the sky and tell me what you deduce." So Watson rubs his eyes and looks up at the night sky, saying: "I see a billion stars, among which there may be a million planets, among which there may be planets much like our Earth, and upon which there may well be sentient life looking back at *their* night sky at this very moment, wondering if *we* might exist." After this speech, Sherlock Holmes pauses for a moment and responds, "No, Watson, you idiot. Someone has stolen our tent."

I love that particular joke for many reasons – for one, it makes me laugh. For another, it has the rhythm and structure of so many great jokes, lulling us into one perspective of the world and then snapping us into another. It's a miniature version of what pundits call a "paradigm shift," a phrase I happen to hate but feel compelled to use, if perhaps by the common laws of conference keynotes. For this morning, I also think the joke captures a key idea that may help us in the topic we're here to talk about: conceptual regeneration, professional renewal, and the healthy arts leader.

I'm going to suggest today that, like Doctor Watson in that joke, our impulse when faced with these and many similar challenges is to focus our weary eyes on the wrong scale. In our case, however, we focus on the tent – tactical responses and procedural adjustments. We hunger for tips, tricks, best practices, new business models, funding initiatives and other adjustments. We hope that these tactical responses might make our work lives less stressful, our workday less jumbled, and our organizations healthier. But by indulging this impulse, we may be missing a more productive scale for exploration. Worse, we may be reinforcing and entrenching the very problems we hope to solve. What if, instead of shuffling the symptoms and the cures, we began to discuss and discover the *cause* of what we're struggling with?

To me, that cause is on a scale at once more massive and more intensely personal. That cause lies deeply embedded in the metaphors we manage by, and in the mental models that drive our interactions with the world.

Arts and cultural managers are in the *business* of metaphor, symbol, narrative, and meaning. Why not engage more of that capacity in exploring the ways we describe and understand what we do?

But first a confession: I'm a huge fan of tips, tricks, tactics and techniques. To me, visiting an office supply superstore is like a pilgrimage to Mecca...so many gadgets and systems and software solutions designed to streamline my professional life. Surely here, I think every time, are the answers to my cluttered desk, my missed appointments, my relentless deadlines. So, I buy some bundle of things and bring them home. I eagerly unwrap them and place them around my workspace. And then, I almost instantly go back to working as I always have...with just a bit more clutter of unused filing apparatus crowding my personal space. My desk is the place that office products go to die. Worse yet, those icons of efficiency eventually seem to glare at me as I work, a constant judgmental reminder of the ways I *should* be working, but can't bring myself to do.

At most professional training sessions and conferences, the experience for me is much the same. They are so gloriously jam-packed with tips, and tricks, and lists of the six steps you've got to follow to do something or other, and the five trends that you absolutely have to track in your line of work. E-mail marketing. Web development. Relationship building. Grant writing. Planned giving. Wonderful stuff. Thoughtfully presented. Earnestly received. But all too soon, they become little dust-bunnies in my brain or illegible scrawls in the conference notes I never look at again. And as with the office supply gadgets, the wonderful insights and energy of professional training can eventually come back to haunt me...more stuff I could and should be doing if I were smarter, or better, or more organized,

or had more time or money. I leave these conferences elated and full of potential, but quickly become exhausted and full of self-doubt.

In my own work, this challenge isn't just a personal issue, but a core concern. As the director of an MBA degree program in Arts Administration, it's my *job* to select the things that future leaders need to know. My graduates are supposed to be ready to manage effective, sustainable, and dynamic organizations or initiatives, not just in the world that was, but in a world that's continually emerging. With the standard tools of academia, I'm supposed to sketch out the path to get them there (fortunately, I have lots of insanely intelligent help, and I'm blessed with brilliant students). But as I assemble my various syllabi every year, there seem to be more and more things that an effective manager *has* to know. Okay, I say, we're covering marketing, human resources, operations, financial accounting, finance, non-profit industry structure, negotiation, education, outreach, fundraising in all of its forms...but boy, we really need international exchange, cultural policy, copyright, contract law, advocacy, technology, and on and on and on. The impulse is to counter complexity with complexity, adding more and more stuff to the curriculum in an effort to stem the tide. But that complexity comes at a great price. It can lead to students with a full tool kit, but with little contextual understanding of when each tool is most appropriate. It can lead them to burn out before they begin, once they see the sheer scope and scale of the challenges they will face as working managers.

At the same time, I'm writing this fairly-daily weblog on the business of arts and culture on ArtsJournal.com. To be honest, I do this almost entirely for my own benefit...my morning mental calisthenics. Plus, the deadline and the public posting force me to actually do what I encourage in others: to find at least one interesting article, issue, or conversation going on in the world each day and try to give it some context or connection. It's a happy accident that anyone actually reads the thing. But I'm pleased and humbled that they do.

Through the course of the 18 months I've been writing this weblog – some 299 entries by my last count – I've seen an eerie mirror out in the wider world of my own struggle. More and more stuff to know, more trends, more tips, more tricks, more challenges. More articles about "shifting landscapes" and "paradigm shifts" (there, I've said it twice now, two points for me), and the tactical responses they require. More events and symposia on "change management" and "capacity building" – without anyone defining either "change" or "capacity." And somewhere in there is the feeling that despite our best efforts, the problems are getting larger and more complex, running away from us just as quickly as we can chase them.

There's a pattern here that might be obvious and familiar to many of you. When faced with a complex problem, we counter with a well-meaning and reasoned

response, only to find the problem made worse by our interventions. The response to office clutter can lead to *more* office clutter. The process of professional training and renewal can leave us *less* responsive and confident. The policies intended to force a new connection between arts organization and community just leave them *more* disconnected, but in different ways.

This pattern, and the fact that it shows up in so many places, suggests that error in scale that I talked about at the beginning. Perhaps as we've been straining toward the night sky for an answer, the real opportunity has been right in front of us. Which, forgive me, brings me to another joke[1]:

> Two villagers decide to go bird hunting. They pack their guns and set out, with their dog, into the fields. Near evening, with no success at all, one says to the other, "We must be doing something wrong." His friend nods his head, and says, "You're right. Perhaps we're not throwing the dog high enough."

Let's put down the dog, and take a breath.

To get to where I'm going, we need one more slight detour. And that's to suggest that we all interact with the world not directly, but through mental models, or through metaphor. It seems too obvious to say, but we can't hold the world in our head. We can only interact with the world, and slowly build a sense of how it reacts to our actions. If you've ever watched an infant or toddler play with a new toy or confront a new challenge, you know what I mean: a burst of experimentation, of play, of trial and error, that slowly becomes a nuanced engagement with the thing...not just then, but at every future interaction.

We never stop building, refining, and rebuilding such models. We just become so exceptional at it that the process becomes invisible to us. We don't have fire in our head, but we know that if we touch it, it will burn. We don't have the mechanics of a doorknob in our head, but we have a fairly nuanced model of how to engage a doorknob to make something useful happen. In fact, we have multiple door-opening-device models in our head ready to engage the knob, or the push bar, or the handle, or the motion sensor.

These mental models are invariably shorthand. They don't require all the details, just a selection of essential elements. We usually adjust them as we confront unexpected responses or new configurations – think of your first experience with one of those touchless sinks in the restroom. But they are shorthand. They are

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[1] This one swiped from Marvin Minsky, "Jokes and the Logic of the Cognitive Unconscious," which isn't particularly hilarious otherwise. It's available on-line at http://web.media.mit.edu/~minsky/papers/jokes.cognitive.txt

abstractions. They are incomplete. They have to be, or else we'd get nothing done.

While we use these models and metaphors quite successfully for simple systems with immediate feedback, we use the same techniques for modelling complex interactions with the world. For example, the human brain turns out to be exceptionally powerful at reading other people's expressions and modelling other people's minds. There are fascinating studies that show that our efforts to model what *other* people might be thinking also starts very early on in life...somewhere between three and four years old for most of us.[2]

This, too, we forget that we're doing until we're horribly wrong – when we misinterpret someone's feelings and get smacked in the face, when we are surprised by a specific response, when we tell a joke that's wrong for the room, or when we meet people who grew up in other cultures.

So, we model our environment. We model other people's minds. And we also model larger systems like social groups, organizations, ethnic groups, demographic groups, environmental systems, and everything else. Just listen closely to any political debate and you will hear two versions of the world slamming against each other, or more often breezing by each other.

So why on earth am I telling a room full of arts and cultural managers that humans interact with the world through metaphor? Metaphor is what we do. We're constantly telling the world about art's ability to change lives, shift perspectives, build empathy, voice alternative views, and question our collective assumptions about the world. And for many in the room, right now, this may be really old news. Duh.

I'm walking us through this idea because it's clear in many situations that we *don't* as managers, as funders, as artists, apply the same creative eye to the metaphors that drive our management practice, and our search for leadership responses.

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[2] One particularly interesting experiment involved showing a child a candy box, but then also showing them that inside was a pencil, and not candy. The child was then told that someone was going to be coming into the room, and asked what *that person* would say was in the box. Children under four usually believed the new person would expect a pencil. Children four and over had the capacity to separate the other perspective from their own, and say that the new person would expect the box to contain candy. To join in the fun, read J. Perner, S.R. Leekam, and H. Wimmer. (1987). "Three-year-olds' difficulty with false belief." *British Journal of Developmental Psychology*, 5, 125–137.

As examples, let's pull out just a few of our collective metaphors about arts and cultural management and take them for a spin. If I'm right, then the change of scale might inform our other conversations, and break a few logjams in our thoughts about what to do next. Let's begin with a big one:

Production and Consumption

When arts managers talk about what we do, our language is infused with the metaphors of production and consumption. We produce theater, present performing arts, mount an exhibition, or launch a program. We do outreach and education. We collect and preserve – much like warehousing. And when we're done, we expose our work to an audience.

On the consuming side is the audience or the community. They come in to see our completed work and react to it. They consume it, not by *actually* consuming it (unless it's food art), but by receiving it or observing it. We have marketing departments and marketing plans. We have a marketing budget, so we must be selling something.

I'm being a bit crass here, but I hope you see the point.

As another example, in the United States, there's a bubbling conversation among arts funders about supply and demand. Many of them believe that they've focused for the past decades on supporting the supply of the arts in America. Perhaps now it is time to shift focus to the demand. There's an imbalance, they have determined, and it needs to be adjusted. Supply and demand is another form of production and consumption. And it's a metaphor we seem to take as reality.

So, what's wrong with that? It seems a useful metaphor in many ways to talk about supply and demand, production and consumption, giving and receiving. All of you know the energy and stamina it takes to arrive at opening night. It *feels* like production. And you *are* producing something. Where's the danger in it?

The danger is that this is a metaphor, a model. It's not reality, it's a convenient abstraction that helps us make decisions and do our work. Our metaphors also define the worldview in which we search for solutions, responses, and reactions. And if we're stuck in a particular metaphor, we are also often blinded to the full range of options in front of us.

There's an old consultant's saying (said by old consultants everywhere):

> If you only have a hammer, every problem looks like a nail.

So, if you only have production and consumption, every problem looks like a market imbalance, or a marketing problem, or a disconnect.

Further, consider the funders who are turning their efforts from demand to supply. If the accepted metaphor is fundamentally flawed, might they just be reinforcing the problem they're trying to solve? Or at the least, might they get no results, or results that surprise them in unpleasant ways?

The true test of a metaphor is to find another option that works equally well or better. Let's unbundle this a bit to see where it takes us: Think for a moment about a meaningful experience you've had as an audience member or observer of a creative work – a theater work, musical performance, sculpture, painting, whatever. By "meaningful" I mean all the usual stuff – transfixing, transformative, a sense of losing time and space perhaps, of being "in the moment." Stick with an audience moment for now, a consumer moment. Do you have something in your head? I'll give you a minute to find it.

Now, a question: who produced that moment? There was certainly a production involved; you were sharing space with it in a theater, a museum, a gallery, a city street, or someplace else. But who produced the moment? Your reaction to the creative expression was likely fuelled by something inside you – a memory, an emotion that was waiting to be expressed, a resonance that perhaps you can't even define or don't care to, a love or knowledge of the art form or the art work. You *brought* something to that moment. The art brought something too.

Now, if you can, recall a moment when you created something, or expressed something to someone else or to an audience. There is likely a moment or two where you felt a similar sense of connection in time and space, when you were "in the zone." We talk about this more often in the performing arts, but there is a tangible quality to an audience and how it reacts during a performance. There's an invisible give and take that draws something exceptional out of the artist, and leads them to a similarly powerful place.

At this moment for the artist, who's producing? Who's consuming? Who supplied? Who demanded? I'm suggesting here that both experiences are co-constructions, not produced and consumed but generated as two or more sides spinning seamlessly together. It seems a minor point but it makes a major difference in how we manage, lead and spend our energies.

And here I'm not just talking about what we call the "lively arts," or the art forms that bring artist and audience together in time and space. There's a similar feeling to visual and plastic arts in many cases, with a synergy between the construction of the work in the studio and the deconstruction/reconstruction of

the individual experiencing the work. Despite the separation of place and time, the blurring of production and consumption is still just as relevant.

I'm sure I'm belaboring the point, but it's worth belaboring. Production and consumption of creative experience is a useful metaphor in many cases. But it's an abstraction, like everything else. When we ignore the other metaphors we might bring to bear, or accept our current metaphors as fact, we limit our vision, our insight, our options, and our choices as managers of the process.

But before we move on to another metaphor worth challenging, I'd like to extend this one a bit further. We have already talked about the intense creative experience as a co-production of sender and receiver, or artist and audience. They both have to be there, be engaged, and be ready for it in some personal way. But this artist/audience connection is only one of the many moments we have the privilege to broker or enable. And we can be thoughtful as managers as we consider where the weight of the moment might live.

For a professional performance, for example, we might focus our energy on the audience, and consider how they might find connection to what's on stage, how we can play a small role in supporting them, encouraging them, or giving them space to find their connection on their terms. In a community or amateur performance, our role as managers might be more focused on the performers, ensuring *their* experience has the greatest potential and space for meaning. For craft circles or heritage organizations, the experience might come in the learning of a handicraft or cultural ritual by many individuals.

There are management and leadership choices embedded deeply in how we define what we do, and what we hope to accomplish. We can choose the metaphor that suits us, rather than letting it choose us.

For example, a colleague of mine took a leadership position at a youth choir with a strong reputation for excellence, and a highly regarded quality in their public performances. The board of this organization expressed great pride in the group's public performances, and judged their success by the quality of the venue in which the children performed, and the level of artistic excellence they achieved in that environment.

But as they slowly noticed a decline in enrolments and a drop in interest, they were bold enough to question the metaphors that drove both their measures of success and their strategic plans. Through a long process, they slowly came to discover that what was truly important to them was engaging young people in the experience of intense discovery of musical performance, and a social exploration of the craft of singing. In this metaphor, a performance of the highest quality possible was still essential, but rather than a goal, it was a *tool* to

reinforce their true purpose. A professional-quality performance was an important capstone and incentive, adding intensity and purpose to the rehearsal process. But it was no longer the center of the story.

When you challenge and inform your metaphors, you manage differently, you lead differently, and you measure differently. And that seems useful to me.

Okay, now a few variations on the theme:

Consider a donor at the announcement of a major gift (and here I mean "major" to *them*). These moments are often filled with emotion, with stories of their family history, their community bond, their life experience. They are expressing a vision of who they are, who they hope to be, what they want for their families and communities, and how they long to be remembered. Who's giving at that moment, and who's receiving? Who's thanking whom?

Or consider the complex relationship between mentor and protégé. We are quick to believe that one teaches and one receives wisdom, but from exploring our own experiences we can quickly see how the learning is a co-construction or a co-production, as well.

In short, the production and consumption metaphor is everywhere we look, or rather, everywhere we *don't* look. And it's worth a moment of our time.

Now let's take on another metaphor, though nothing quite so grandiose:

The Fiscal Year

We all know the rhythm of our fiscal year, or our season. It's a necessary time frame for so many things – from financial reporting to grant cycles to tax documentation. But it too can become for us a gold standard for how we manage and measure our work. If we're not careful, we can begin to think it's the appropriate frame for everything we do.

Think back to any of those meaningful moments you considered before: You in the audience; you on the stage or in the gallery or in some other creative space. What sort of time frame was required for that moment? Was it a calendar year? Was it an hour and a half? Or perhaps, was it a lifetime, or even two lifetimes: Your life to that point and the artist's, or yours and at least one audience member.

Of course, there are multiple rhythms and cycles to what we do. As managers and leaders, we must always work to recognize them and guide our organizations accordingly.

The great philosopher John Dewey explored these rhythms of creative experience more than seventy years ago in the speeches that became the classic book, *Art as Experience*. He had a glorious and brain-bending way of exploring the nature of the creative moment, and of questioning what still today are our fairly rigid metaphors for artistic expression and experience.

In one passage, he describes a flash of lightning illuminating a dark landscape. In that moment, we have a sudden view of the objects and we recognize them. But, he says:

> ...the recognition is not itself a mere point in time. It is the focal culmination of long, slow processes of maturation....It is as meaningless in isolation as would be the drama of Hamlet were it confined to a single line or word with no context.

If I didn't know the objects illuminated in the landscape, that lightning flash would carry little meaning for me. File *that* somewhere in your fiscal year.

Of course, I'm preaching to the choir here. We all know that the creative moment is not a moment at all, but a flashpoint in the full experiences of the audience, the artist, the donor, the volunteer, the staff member, the board member. We can all stretch our metaphors to make room for multiple cycles in our work, multiple rhythms in our days.

But some metaphors are so persistent, so insistent, that they crowd out the other possibilities. The fiscal year is a particularly brutal abstraction. It requires continual energy to hold it only where it's useful to you and to your organization. By what time scale do you choose what to do, how to do it, and how to measure your success?

Partnership

Do we dare? I think we do. Partnership is a wonderful word. It is the stuff of conferences and constant conversation. We need more of them. They must be built. They must be fed. They must be extended and enhanced.

The dictionary tells us that partnership is "a relationship between individuals or groups that is characterized by mutual cooperation and responsibility, as for the achievement of a specified goal."

As I said, it's a glorious metaphor, but it's a metaphor nonetheless. When we approach it without question, we can simply reinforce the problems we are seeking to solve through its use.

How so? The metaphor of "partnership" carries with it the assumption of separation. The word, itself, is from a Middle English root meaning "portion, part, or division." So, by seeking a partnership, you are accepting and reinforcing the idea that you and your partner are separate, that the lines between you can be reasonably drawn. And because you actively "form" such a thing, you also bundle the assumption that without your agreement, the organizations or individuals involved wouldn't be influencing each other's choices or options or lives.

Of course, that's nuts.

For one thing, we are all inextricably interconnected in startlingly practical ways...by our markets, our geography, our leadership, sometimes even our board members, by the common communities we serve, and by the various revenue streams we draw upon.

For another thing, consider that meaningful moment once more. How many other arts organizations or public or private institutions or individuals played a part in that connection between artist and audience? My transfixed moment in a symphony hall may carry with it the church music I heard as a child, the muscle memory of my high school French horn lessons, the connection I feel for a family member through our mutual love for the piece, the power of sharing that sound with my wife beside me. The symphony may have been the lightning in the field, but I was prepared for that flash by a thousand connections that came before.

The term and the metaphor of partnership can often blind us to the connections that already exist, that bind all of our choices and options to our peer institutions in the arts, our schools, our communities, our governments, and our disciplines. So often, instead of "forming" something, we are really just recognizing a connection that already exists between organizations, and informing it with conversation and thought. We are making the implicit connection explicit, and adding intention to the mix.

But in many places, we're starting to come around. Just last week, there was a report released by the United Kingdom's Department for Culture, Media, and Sport on the future of museums.[3] In part, it discussed the challenge of access for all the great art and artifacts scattered around the country, with so many in storage by London's major museums. The report framed the question in a rather extraordinary way:

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3 www.culture.gov.uk/global/consultations/2005+current+consultations/museums_21st_century.htm

> ....museums' collections and acquisitions, while remaining in the direct ownership of individual institutions, could also be viewed as contributing to the nation's "public collection" as a single resource under the custodianship of many individual museums.

So, although the museums are separate institutions, their collections can be considered part of a single public trust. They are separated in space and governance, but stewarding a common pool. We could also say the same of the creative moments of connection we keep talking about. "Partnership" isn't a particularly useful metaphor here, and perhaps even clouds a different truth.

Before I move on to the home stretch (and trust me, it's coming), let me just fling out a few more metaphors to watch for as our conversations continue today and beyond:

"Like a Business"
Okay, it's a simile, not a metaphor. But it's silly, nonetheless. In fact, it's silly *because* it's a simile. Arts organizations *are* businesses...collections of people and contracts and capacities and assets. Anything they do is "like a business." And even if they weren't businesses, what *other* business are we supposed to be like? Enron? Halliburton? Usually, this phrase is a placeholder for more specific behaviors like accountability, responsibility and sustainability.

If that's what we mean, let's just say it.

Emerging Leaders
Sorry, I couldn't resist given our conversations yesterday. It's a wonderful and nurturing sentiment, but a complicated metaphor when we start to spin it out. The implied evolution for people in this group would be "leaders who have emerged," and that's just odd. The best leaders I know at any level of an organization are *constantly* emerging. As someone said yesterday: you're done when you're dead.

I haven't yet come up with an alternative metaphor, so for now let me suggest a slight simplification:

> Leaders

We could honestly extend this exercise for days at a time, but I think you get the gist. And some of you are likely sick of it. Consider this a party game at your next staff meeting: pick a commonly held metaphor for what you do, and deconstruct it. It's particularly useful for problems or challenges that continue to return or get worse despite your tactical efforts and best intentions. When you flex the metaphors a bit, another option is likely to drop into your head.

So, you may well be asking, apart from tearing down long-held and even comforting beliefs, leading us to question everything we do, and making us nauseous or anxious or just plain mad, is there any *positive* outcome of this different scale of thinking?

Thank goodness, yes. And let me end with it. What we"re beginning to do in our MBA degree program in Arts Administration, and elsewhere, is to consider how we can call forward these metaphors to our advantage. How can we add metaphor, itself, to our tool kit as managers and leaders in the arts? As we do so, can we respond to the complexity of our work and our world by teaching *less* rather than more? Could there be patterns of knowledge or awareness that reunite the many disconnected things we do with our days?

I'll admit that our first steps are horribly clumsy, and inevitably wrong, but I believe there's something there. Consider, for example, these two questions.

> How might you model these in your mind? How do individuals and groups attach value to a lived experience? And how to they express that value in money or time or attention?

In those two questions lie marketing, development, outreach, education, architecture or environment, volunteerism, and even experience design. If we can learn to more effectively observe, infer, inquire, and model these processes, we can translate them in a thousand different ways in service to the creative moment and to the particular form of expression we hope to support.

There's finally emerging research in the arts that's cutting to this particular core. The Connecticut Commission on Culture and Tourism just released a report in July, exploring how and why people value arts experiences – in their own words, on their own time.[4]

And beyond specific research in the arts, a more broadly framed question can lead to direct connections with other disciplines of study – from psychology to social science to urban studies to neuroscience. There are people already studying how people use the built environment, how cities form and evolve, how individuals construct meaning and purpose. We can learn from them if we frame our questions well.

And I'll admit that even the tearing down of persistent metaphors can lead to positive results. Consider the production/consumption metaphor, and the alternative of a co-production. The latter suggests that the entire organization

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[4] Available at http://www.ctarts.org/Public.htm

has a meaningful role to play in the core purpose of the organization. It's not a production and creative team creating something to be sold and supported by marketing and development. It's a co-production that requires all of them, as well as front-of-house or audience services, facility management, custodial staff, ushers and volunteers, and the audience themselves.

And to me, at least, the idea of a co-constructed experience offers a healthy shift in defining what we do. In all of our efforts, we can only ever provide half of that moment. It's not a gesture of force, or of completion, or delivery, but an invitation, an open hand. It's a posture that's much more compelling and attractive, I believe, to the future leaders we're aching to attract. And it might make our lives a touch more sane.

I'll close with a quote from Jacques Lusseyran, the French resistance leader from World War II who so vividly describes his discovery of the world despite his blindness. To me it captures both the glorious world that's available to us if we are willing to expand and explore the metaphors we live by. And it speaks to the nature of the creative moment of connection, and the part we play as arts managers within it. He says:

> If I put my hand on the table without pressing it, I knew the table was there but knew nothing about it. To find out, my fingers had to bear down, and the amazing thing is that the pressure was answered by the table at once. Being blind I thought I should have to go out to meet things, but I found that they came to meet me instead. I have never had to go more than halfway, and the universe became the accomplice of all my wishes.[5]

May we all discover our world in this way. And may the universe be the accomplice of all of your work. Thank you for your attention and your time.

This line of thinking is a constant work in progress.
Feedback and comments are gratefully received:
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[5] Jacques Lusseyran, *And There Was Light: Autobiography of Jacques Lusseyran, Blind Hero of the French Resistance.*

Q&A – Andrew Taylor

The following comments and insights were shared after Andrew's speech:

- In response to a question about the challenges inherent in working with and for a changing multicultural population, Andrew suggested that the answers and tools are often already within us. We must work to translate the answers to funders and other stakeholders

- The metaphor "audience development" is one that suggests we think the audience needs to be developed and we must not assume this. Many people enjoy the arts for reasons other than "development" and don't need or want to understand the art's form in order to appreciate it. In order to avoid a metaphor driving people away from us we must ask what we want to achieve and ensure that we mean what we say.

- The issue of the arts sector being forced into the business model and causing a split vision led Andrew to suggest that "it always takes a large community to make a metaphor.... We stepped into this trap ourselves." We can behave like a business, because we are a business; but we can and should participate in different metaphors depending on their use to us at any given time.

> *"All models are wrong. Some models are useful."*
> attributed to George E. P. Box[6]

- Many organizations struggle with their marketing materials, realizing that they don't necessarily reflect what the patron is buying, or reflect the values, meaning and connection they are trying to create. The audience has many reasons and needs for their participation. The Clarice Smith Performing Arts Centre at Maryland was cited as incorporating their values in their marketing; see http://claricesmithcenter.umd.edu/website/c/home.

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[6] This quote is often attributed to W. E. Deming.

Succession Planning Panel

Pat Bradley, OAC's Theatre Officer and Research Manager, introduced the Succession Planning panel session and thanked the Young Managers' Roundtable Committee for their work and insight in planning the session. The session was facilitated by Jonathon Knapp of the Thunder Bay Symphony Orchestra, who was a member of the Young Managers' Roundtable.

Jonathon introduced the panelists: Yvette Nolan, Artistic Director of Native Earth Performing Arts; Kim Tomczak, Executive Director of V tape; William Lau, Artistic Director of Little Pear Garden; and Kathleen Sharpe, Director of the Ontario Cultural Attractions Fund. Each panelist was invited to introduce his or her organization and recount his or her experience with succession planning.

Yvette Nolan recounted her "anti-succession story" at Native Earth. Prior to Yvette's appointment as Artistic Director, Native Earth had had four ADs in two years. After 25 months of being in the position, there is still no succession plan, although a board development and strategic planning process that will lead to a succession planning process is underway. Yvette pointed out that although the advice on alignment of succession planning to organizational strategies is wonderful; it is hard to do when the organizational strategy is survival. Succession planning at Native Earth is further challenged by the cultural mandate of the organization, which narrows the playing field of available candidates. Yvette concluded by pointing out that the person who turns an organization around is not necessarily the person to lead it into the next developmental phase.

Kim Tomczak is one of the founders of the artist-run centre V tape. Three years ago Kim and his partner, Lisa Steele, informed the board that their roles in the organization would be changing, thus evolving the organization into a form of succession planning. Kim's duties have shifted from day-to-day management to the creation and building of a new centre; Lisa's duties have changed from financial management to Artistic Director. V tape has always had a built-in ability to plan for succession owing to its strong mentorship program with various colleges and universities. Kim suggested that it is more difficult to plan for succession if you are an organizational founder, because of the personal investment. He pointed out that how well one delegates is a good indication of one's readiness for succession planning. Kim identified the inability to retain staff on small salaries and no benefits as a deterrent to succession planning.

William Lau is the founder and Artistic Director of Little Pear Garden, a very small organization that promotes and develops Chinese performing arts in Canada. William has embarked on a slow and careful process of succession planning. William offered the following suggestions:

1. There must be a self-readiness to let go and pass on your position.
2. Identify potential candidates, considering the following:
   - Appropriate match in values, work style and personality.
   - Culture-specific considerations.
   - Consistency with organizational mission.
3. Board involvement and timing is critical.
4. Build a profile for the successor:
   - Partner them with a board member to work on a special project.
   - Give them responsibilities, allowing them to take risks.
   - Acknowledge them publicly.

Kathleen Sharpe brought the perspective of a Board of Director member to the session. Sharing stories of two boards that Kathleen has been or is a member of, she demonstrated how not having any form of succession plan can lead to an inappropriate hire and contribute on some level to the demise of an organization. Her second tale, in the present tense, involves an active board and good staff, who have no succession plans in place. As chair of the board, Kathleen will, in the very near future, undertake to implement a succession plan. In closing, Kathleen offered the following advice:

1. Don't take anything for granted.
2. Insist that your board set up a committee for succession planning.
3. Institute systems for both staff and board succession.
4. Don't settle for a verbal agreement.
5. When you have a plan – follow it.

Q&A – Succession Planning Panel

The following is a summary of ideas and suggestions that were shared in the question and answer period:

- No matter what size organization you work for, if you want to ensure that a succession plan is put in place, it is the Board of Director's responsibility to activate and see the process through. For larger organizations, where staff might not have access to the Board, one might need to trigger the process via one's supervisor.

- It is important to develop the community of potential successors in the work that you do in order to build a pool of possible candidates.

- For artist-run centres and smaller organizations that face many barriers to being able to develop succession plans,
  1. It is important to always be refining and assessing the organization's mandate with the board.

2. Lower wages lead to inevitable turnover, but this can be built into organizational planning and thinking.
3. Organizational profile can be raised with post-secondary administration programs in order to build relationships with potential successors.

- Documentation was advocated by many as a tool for succession:
  1. If people in leadership positions develop a narrative of the organization, this can be shared with successors to perpetuate the emotional memory of the organization.
  2. Thorough documentation can remind us of what worked and what didn't.
  3. An Environmental Survey, which acts as a strong reality check, in conjunction with internal narrative would provide clear guidelines for successors.
  4. Handbooks for individual jobs are valuable documents.
  5. A newsletter with contributions of past stakeholders promotes a sense of history.

- Transparency and knowledge of tasks and responsibilities up and down the ladder is advantageous in dealing with emergency situations.

- Artist-founded, culturally specific organizations face unique issues in succession as they are rooted in many communities. Suggested solutions included the following:
  1. Selecting and building a new generation of arts managers with different skills than the founder.
  2. Building a collective of several people to take on the single role the founder filled.
  3. Rotation of leadership roles.

Summary of Rick Lash's The Leaders' Journey Session

In his introduction Rick asked: "How do you as leaders in the arts community create an environment where you are not only doing great things as leaders in your own right but also doing great things for the people coming up behind you?" He thus identified the challenge of effective leadership as understanding how we encourage those behind us while continuing to be successful and develop ourselves. In keeping with the theme of the conference, Rick identified a powerful aspect of regeneration as recognizing where we have common ground with our peers.

Rick outlined the three topics that he would cover:

1. Definition of leadership excellence.
2. Becoming a leader requires a transformational process.
3. Regardless of your generation or time in history there are common themes or stages to the leaders' journey.

In defining leadership Rick offered two quotes from Kouzes and Posner:

"*...the art of mobilizing others to want to struggle for shared aspirations...*"

"*...leadership is a reciprocal relationship between those who choose to lead and those who decide to follow...*"

Leaders who can build relationships and trust, manage emotions, create a shared vision and inspire others are identified as defining leadership excellence.

Each of these characteristics requires "emotional intelligence" – the recognition and management of not only our own emotions but also the emotions of others.

This brings us to the question of what causes people to transform and inspires us to be leaders. Rick suggested that in the face of this question we need to think back to our original calling and what inspired us then. We must recognize that many of our original strategies will stop working for us, often triggering or necessitating a transition. Some suggested transformational experiences include the following:

- Early work experiences.
- First time managing people.
- Fixing a crisis.
- Leading a project team.
- Increasing in job scope or responsibility.
- Business failure.
- Demotion or being fired.

- Dealing with an employee performance problem.
- Breaking out of a rut.
- Switching jobs or careers.
- Personal traumas.
- Completion of formal education.

Rick then identified the maturity process in the growth of an effective leader. We move from a focus on ourselves, which is critically important to our development early in our careers, to a shift that involves a move away from self to a focus on our community and working with others. The following are personal transformations that Rick identified in the growth of a leader:

Shift from...		**Toward...**
Self focus	**PREPARATION TRANSITION TRANSFORMATION**	Community focus
Task driven		Relationship driven
Accountable for self		Accountable for others
Personal mastery		Mentoring or teaching others
Personal achievement		Significance and contribution

The leader's journey, no matter who we are and where we live or have lived, is marked by the similar leadership issues and characteristics that we all face:

- Competency – feelings of inadequacy.
- Changing relationships with peers when promoted.
- Having to give things up to encourage the growth of those around you.
- Re-evaluation and development of a new sense of purpose, values, beliefs and commitment.

"Stories touch us so deeply because they help give visibility to things we can't quite articulate in words."

Citing Joseph Campbell's study of myths and their underlying and common themes, Rick pointed out that what compels us about the characters of myths and stories is that they are in transformation on both an emotional and intellectual level. There are common stages that all heroes of myths and stories go through:

1. The Call.
2. Preparation.
3. Crossing the Threshold.
4. Finding Support.
5. Road of Trials and Facing the Abyss.
6. Transformation and Return.

"Build it and he will come."
Ray Kinsella – *Field of Dreams*

1 - The Call may come:

- Although we might not be sure what it means, or what we have to do about it.
- At various stages – often when something is lacking in our life or career.
- When we are at a loss as to our purpose.
- When we are overwhelmed by systemic restraints.
- When we are feeling accountable only for one self.
- When our strategies are no longer effective.
- When we discover or re-discover a talent.
- Unexpectedly.
- From within or from outside.

Rick demonstrated "The Call" by showing a clip of the film *Dead Poets Society.*

2 - Preparation has certain hallmarks:

- Withdrawal and removing oneself from one's normal surroundings.
- Reflection on one's situation, seeking patterns and themes.
- Evaluation of what is important, one's strengths and weaknesses and the establishment of a code of honour to see you through the journey.

3 - Crossing the Threshold represents the movement from the known to the unknown, involving

- Taking concrete action.
- Facing our threshold demons.
- Self-doubt and weakness.
- Giving up a part of who we are as an individual to move forward.
- Allowing past experiences that have become invalid to be left behind.

4 - Finding Support represents the appearance of a helper who

- Provides perspective, assistance, support and a different view of self.
- Often appears from unexpected places and bearing gifts.
- Offers advice on what to expect, having had experience.

"You need to help yourself by identifying people to help support you through the transition phase."

The phases of Crossing the Threshold and Finding Support were demonstrated by a scene from the film *Shirley Valentine.* The phases of Crossing the Threshold with examples of facing one's demons were demonstrated by a scene from the first *Lord of the Rings* film.

" The reality is that we don't get there from here. The only way figure things out is by actually forcing ourselves to go on the road of trials."

5 - The Road of Trials and **Facing the Abyss** involve

- A series of experiences that test our resolve and build our character.
- Challenges that become more difficult as the journey progresses.
- A series of tests that results in new values and behaviours that become embedded as we build a new identity.
- Often encountering many abysses in our journeys, coming face to face with the core of who we are.
- Facing our own personal obstacles, things that have held us back, that must be resolved to allow us to move on, giving us a deeper insight into ourselves.
- Gaining the strength and purpose to move forward.

Having come through the abyss we come away a fundamentally different person, having gained deep insight. The hero in most stories returns having transformed from an individual contributor into a mentor or leader of others.

6 - Transformation and Return is characterized by returning home with self-knowledge and a willingness to share our wisdom and perspective.

The power of transformational leadership was demonstrated in the last scene of the film *Dead Poets Society.*

Rick closed with a story of a mural in Grand Central Station in New York City. Over the years the mural became covered in grime. A clean-up project uncovered the design. One brick was left uncleaned, to demonstrate the difference. Rick asked us to remember why we chose the arts as a calling and to remember that underneath our experience is our personal mural, waiting to be uncovered by those of us willing to undertake the journey.

Closing Session - Open Mic

The Closing Session consisted of an open-mic session for delegates to share their impressions of the conference. Below is a review of some of those thoughts:

- An appreciation for the benefits of having many generations working in arts organizations, along with the tools that the conference offered, to seek ways to continue the integration of generations.

- The opportunity to meet with so many people with similar circumstances. An opportunity was identified to develop an ongoing peer relationship or professional learning circles for smaller organizations without means to have development or an umbrella organization.

- The question of mentorship received varying comments:
    1. A mentor/mentee reception to encourage connections.
    2. Encouragement to funders to continue positive acknowledgement of mentoring activities in funding policies and guidelines.
    3. The creation of a secretariat for mentorship is not a solution; there are national ASOs in place who can facilitate mentorship strategies.
    4. A possible solution might be the creation of positions in all organization, allowing current management to mentor ongoing operational staff.

- Perhaps a follow-up conference could offer more for senior leaders.

Closing Remarks

Glenn Hodgins, on behalf of OAC, thanked the delegates for their feedback and encouraged everyone to fill out the conference evaluation online. Thanks were extended to the Steering Committee, Young Managers' Roundtable, the speakers, panelists, presenters, Mary Rowe for her facilitation, and the OAC staff for their contributions.

ONTARIO ARTS COUNCIL
CONSEIL DES ARTS DE L'ONTARIO

RE-GENERATION

THE HEALTHY ARTS LEADER

Report on the
Ontario Arts Council's
Arts Management Conference

Annexes

February 6 and 7, 2005

Prepared
by Carolyn Mackenzie

ONTARIO ARTS COUNCIL
CONSEIL DES ARTS DE L'ONTARIO

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Annex 1

Evaluation Summary

In order to assess the conference's effectiveness and analyze "next steps," an invitation to participate in an online evaluation was sent out to all conference delegates after the conference. Of a total of 312 delegates there were 104 online evaluation responses – one-third of delegates, 56% of whom were managers. The first 18 questions related to the conference itself. The last nine questions relate to the HR practices in the delegate's organization. Survey participants were asked to rate various elements of the conference on a scale of 5 (excellent) to 1 (poor) or 4 (excellent) to 1 (poor).

Lead speakers Nora Spinks and Andrew Taylor were very popular, Nora with 61% of the respondents giving her an excellent rating of 5; Andrew received 36% approval at a rating of 4 out of 5. Overall the lead speakers were deemed of greatest value as a conference presentation format by 63% of survey participants.

Between 32 and 40% of respondents rated both the *Mentorship Strategy Discussion* and the *Challenges in Professional Development* plenary sessions at the midpoint of 3 out of 5. Between 50 and 60% of survey participants rated both the *Succession Planning* session and Rick Lash's *Top Leadership – Taking the Inner Journey* session at either 4 or 5 out of 5. Overall the plenary sessions were rated at the 3 out of 4 value level by 52% of respondents.

The *Peer Breakout* sessions were rated as least valuable by 40% of respondents whereas the *Subject Breakout* sessions were given a rating of 3 out of 4 by 41% of the respondents. The Alexander Technique and yoga classes were attended by 28 survey participants. The facility was given a rating of 4 out 5 by 44% of respondents.

Overall, 90% of survey participants felt that the conference was of value to them, with 93% of respondents suggesting there would be value in similar conferences in the future and 44% of whom felt future conferences should be held annually.

Highlights of the HR practices of the delegates' organizations include

1. 57% of organizations have human resource policies.
2. 66% of organizations do not have a dedicated staff member responsible for human resources.
3. 83% of organizations use contracts for its employees.
4. 71% of organizations use contracts for its sub-contractors.
5. 90% of organizations have job descriptions.

6. 67% of organizations conduct annual performance reviews.
7. 54% of organizations provide employee benefits beyond legislated requirements.
8. 57% of organizations have a professional development budget for its staff.
9. 52% of organizations do not have a Board of Directors human resource/personnel committee.

Annotated Comments

The following were identified by delegates as what they would like to see in the way of follow-up to the conference (the number at the end of each point indicates the frequency of the comment):

- A report of the conference with access to handouts and results of brainstorming sessions. (20)
- Follow-up and funding for a mentorship strategy. (9)
- Access to materials relating to human resources and professional development. (8)
- Continued access to workshops and conferences. (5)
- Answers to the issues discussed at the conference. (4)
- Development and sharing of succession planning strategies, including Board development. (3)
- Networking opportunities, including students. (3)

Favourable elements included the following (the number at the end of each point indicates the frequency of the comment):

- The opportunity to network and exchange ideas. (36)
- The speakers in general. (20)
- The cultural and generational diversity of the delegates. (11)
- Nora Spinks. (9)
- Atmosphere of community, openness and cohesiveness. (7)
- Availability of HR strategies, advice and tools. (7)
- The idea of the conference, that these issues were addressed. (6)
- Breakout sessions. (6)
- Andrew Taylor. (3)
- The organization of the event. (3)
- Peer and plenary sessions. (3 each)

The elements of the conference that delegates found problematic were the following (the number at the end of each point indicates the frequency of the comment):

- The breakout facilities were inadequate. (16)
- The peer breakout sessions. (11)
- Some of the breakout sessions were oversubscribed. (9)
- The leadership of the breakout sessions was uneven. (9)
- Not enough networking time. (6)
- Overemphasis on mentorship. (5)
- Not enough concrete subject-specific materials. (5)
- Relevance of the sessions. (5)
- The event being held on a weekend. (4)
- The conference being scheduled at a busy time of year. (3)
- Breakout sessions were too short. (3)
- Breakout sessions were different than expected. (3)
- No conclusions were generated. (3)

Other comments or suggestions include the following (the number at the end of each point indicates the frequency of the comment):

- Appreciation to the OAC for its commitment in hosting the conference and encouragement to host more events. (21)
- The breakout sessions took on a discourse quality rather than offering direct help and specific skills. (5)
- A suggestion for future events to include sessions specific to discipline and organization size. (4)
- The breakout room facilities were inadequate. (4).
- Include a focus and sessions specifically designed for new managers and someone to speak on behalf of new managers. (4)
- A sense that the conference was an opportunity for OAC to gather information or create a focus group. (3)
- Preference that future events be held during the work week. (3)
- More information provided on sessions prior to registration. (2)

Annex 2

Steering Committees

Conference Steering Committee

Philip Akin	Obsidian Theatre Company
Pat Bradley	Ontario Arts Council
Krista Dalby	Ontario Arts Council
Jerry Doiron	Shaw Festival
Louise Dompierre	Art Gallery Hamilton
Eric Dubeau	Ontario Arts Council
Mallory Gilbert	Tarragon Theatre
Jocelyn Harvey	Canada Council for the Arts
Glenn Hodgins (Chair)	Ontario Arts Council
Julia Howell	Ontario Trillium Foundation
Jonathon Knapp	Thunder Bay Symphony Orchestra
Cynthia Lickers-Sage	Ontario Arts Council
Carolyn Mackenzie	Conference researcher and coordinator
Jean Malavoy	Canadian Conference of the Arts
Jane Marsland	Consultant
Micheline McKay	Opera.ca
Shadi Mogadime	Consultant
Yvette Nolan	Native Earth Performing Arts
Claudette Paquin	TV Ontario
Catherine Smalley	George Cedric Metcalf Charitable Foundation
John Watson	Theatre Direct
Rudi Quammie Williams	Theatre Passe Muraille
Joyce Zemans	York University

Young Managers' Roundtable Committee

Melanie Aquino	Classic Theatre
Patrick Bourbonnais	Mouvement d'implication francophone d'Orléans
Pat Bradley (Chair)	Ontario Arts Council
Natalie De Vito	Mercer Union
Glenn Hodgins	Ontario Arts Council
Jonathon Knapp	Thunder Bay Symphony Orchestra
Sally Lee	Toronto International Film Festival Group
Cynthia Lickers-Sage	Ontario Arts Council
Jane Marsland	Consultant
Pasha McKenley	ColouUred Girls Collective
Neketia Perez	Ballet Creole
Geneviéve Pineault	Théâtre du Nouvel-Ontario
Catherine Smalley	George Metcalf Charitable Foundation
Alice Toyonaga	School of Toronto Dance Theatre
John Watson	Theatre Direct Canada

Conference Coordination

Carolyn Mackenzie	Conference coordinator and researcher
Candice Turner-Smith	Project coordinator
Arts Box Office	Registration Coordination

OAC Conference Management Team

Glenn Hodgins	Touring and Compass Program Officer
Pat Bradley	Theatre Officer and Research Manager
Krista Dalby	Program Assistant, Touring and Compass
Feizal Bacchus	Operations Manager
Kirsten Gunter	Communications Manager
Janice Lambrakos	Information Services Coordinator
Josée Bourbonnais	Francophone Support Coordinator
Myles Warren	Dance, Chalmers & Awards and ASO Officer
Daphnée Nostrome	Communications Assistant
Nicole Liao	Office Services Clerk
Mario Sangaraille	Receptionist

Additional Thanks

Mac Hillier	For the conference logo design
Volunteers	From the C Magazine, Humber College School of Creative and Performing Arts, Mercer Union, and University of Toronto Arts Administration Program

Annex 3

Selected Biographies

Nora Spinks

NORA SPINKS is President of Work-Life Harmony Enterprises, an international consulting and training firm based in Toronto. For more than 20 years, Nora has been providing leadership to leading corporations, governments, labour and community groups on work-life issues by focusing on creating supportive work environments, strengthening families and building healthy communities.

An experienced researcher and consultant, Nora has developed and implemented a variety of unique federal, provincial, community and corporate programs focusing on employee health and well-being, family care, workplace flexibility and work-life harmony. She developed Canada's first national family care resources and referral program and the first national network of employer-supported short-term and seasonal childcare services. She is currently involved in the development of back-up childcare centres in Toronto and advocating for workplace and community supports for families with extraordinary care needs.

As a recognized leading authority on work-life issues, Nora is a sought-after media contact and is quoted and profiled widely in print, and on radio and television nationally. She is the author of The Manager's Work-Family Tool Kit and frequent contributor to Canadian HR Reporter and HR Professional, as well as to the recently published texts Advancing Women's Careers and Managing Human Resources.

Nora has been actively involved in the development of the Centre for Families, Work and Well-being (CFWW) at the University of Guelph. Her other community endeavours have included active involvement with the Centre for Workplace and Community Well-being, Canadian Child Care Federation, The Learning Partnership, Conference Board of Canada and Eva's Place, North York's Emergency Home for Youth.

Andrew Taylor

ANDREW TAYLOR is Director of the Bolz Center for Arts Administration, an MBA degree program and research centre in the University of Wisconsin-Madison School of Business. An author, lecturer and researcher on a broad range of arts management issues, Andrew specializes in business model development for cultural initiatives and the impact of communications technology on the arts.

As a management, communications and technology consultant, he has worked with the International Society for the Performing Arts, American Ballet Theatre, Streaming Culture, the Center for Arts and Culture, the Lower Manhattan Cultural Council, and the League of Historic American Theatres, among others. He helped develop the pro forma and operating plan for Madison, Wisconsin's $205-million downtown arts district and led the business model development team for a proposed Digital Dance Library initiative.

Andrew received his master's degree in Arts Administration from the University of Wisconsin-Madison and serves on the board of the Association of Arts Administration Educators. He also writes a featured weblog on ArtsJournal.com on the business of arts and culture (www.artsjournal.com/artfulmanager/).

Mary W. Rowe

MARY W. ROWE is a professional facilitator who develops and manages projects involving the public and private sectors, labour and local communities. She works specifically in the areas of health, governance, housing, social services, the environment, education, and culture. She directs a program called Ideas that Matter for Avana Capital Corporation, which includes convening and publishing on various issues in the public interest (www.ideasthatmatter.com). The current issue of ITM focuses in neighborhood revitalization and specifically on the proposed redevelopment of Regent Park in Toronto, the country's largest public housing community. ITM is also one of the sponsors of the upcoming Creative Places + Spaces conference scheduled for October 2005 in Toronto. In addition she provides community development assistance to select clients, including the Toronto Maple Leafs.

Sibyl Frei

SIBYL FREI, of DeGros Marsh Consulting, brings content expertise and facilitation skills to her work with cultural organizations, other not-for-profit groups, and non-profit – government partnerships. Sibyl was the managing editor of Ragweed Press / gynergy books for over ten years. Since selling the press in 2000, she has conducted cultural sector research for governments and sector organizations, undertaken numerous projects from planning and fund raising to management and successful completion, and facilitated conversations between many stakeholders within and across sectors. Sibyl is completing a Master of Adult Education at Saint Francis Xavier University with a focus on arts management.

Jean Malavoy

JEAN MALAVOY comes to the CCA with a wealth of experience in the cultural sector. Before joining the CCA in July 2004, he was the Executive Director of La Nouvelle Scène, a francophone arts venue in Ottawa. His past work also includes 12 years at the Ontario Arts Council, as well as time at the Ontario Trillium Foundation, the Bureau des regroupements des artistes visuels en Ontario (BRAVO), and the Conseil des organismes francophones du Toronto métropolitain. Jean also worked as a consultant in the cultural sector through his company, Jean Malavoy & Associés.

One challenge which he holds dear to his heart is to make Canadians aware of the fundamental role artists play in this country's quality of life. "Artists should be recognized and valued by society, and be able to make a decent living. We mustn't forget that it is artists who civilize us." He sees the arts as central to this country's well-being.

Susan Cohen

SUSAN HILARY COHEN has a rich and varied background which includes experience as a writer/broadcaster, producer and editor. She is a specialist in public policy and program development and worked with the Ontario Arts Council for twenty years in progressively senior positions. Since leaving the Council, Susan's consulting practice has focused on fundraising, community arts and education programs, and volunteer development strategies. Her clients include organizations in the arts, health and education sectors.

Currently working as program manager for Cultural Careers Council Ontario, Susan has initiated a series of programs for career skill development which address the needs of the full range of sectors within the cultural community.

Robert D. Johnston

BOB JOHNSTON is Executive Director of Cultural Careers Council Ontario which supports access to employment and career development in Ontario's cultural sector. He has had 28 years of experience as an arts administrator. He was General Manager of the National Ballet of Canada from 1979 to 1996. Prior to that he served as Deputy Minister of the Ontario Ministry of Culture & Recreation from 1996 to 1979. Prior to entering the cultural sector he held positions for 25 year in personnel and labour relations management in government and industry

serving as Ontario Deputy Minister of Labour, Chairman of the Ontario Labour Relations Board, and Director of Industrial Relations for John Inglis Co. Ltd.

William Lau

WILLIAM LAU was born in Hong Kong and raised in Montreal. He graduated from York University with a Master of Fine Arts degree in Dance, and was enrolled in the Doctoral program in Ethnomusicology. Lau originally trained in both western classical ballet and Chinese dance; he now specializes in dance (female) roles in Peking opera. An actor, dancer and singer combined, he has interpreted qing-i (upright women), hua dan (courtesan women) and dao ma dan (warrior women) roles in many classical repertoires. He is currently the Artistic Director of the Little Pear Garden and the Board President of the CanAsian Dance Festival.

Yvette Nolan

YVETTE NOLAN is a playwright, dramaturg, director and educator. Her play Annie Mae's Movement was produced in Whitehorse, Winnipeg and Halifax in 1998-99 by Hardly Art, and in Toronto by Native Earth in 2001. Other plays include BLADE, Job's Wife, and Video, the libretto Hilda Blake and the radio play Owen. As a dramaturg, she works across Canada. She has lived in Winnipeg, the Yukon, Nova Scotia and is currently the Artistic Director at Native Earth Performing Arts in Toronto. The President of the Playwrights Union of Canada from 1998-2001, she currently serves as the President of Playwrights Canada Press.

Kathleen Sharpe

KATHLEEN SHARPE has 25 years of experience as a senior manager and administrator in government and the cultural sector. She has been Director of the Ontario Cultural Attractions Fund since its inception in 1999. The Fund, a unique program established to support cultural tourism attractions through a combination of grants and loans, has committed over $20 million to over 160 organizations around the Province. Prior to OCAF, Kathleen was Director of the Culture Division of the Municipality of Metropolitan Toronto, a post she held from 1991 until amalgamation of the municipality into the City of Toronto. Kathleen's leadership led to the adoption by Metro Council of its first comprehensive cultural policy, Metro's Culture Plan, in 1994. She managed the transition of cultural programs and staff of 150 during the changeover from Metro to the new amalgamated City of Toronto. Kathleen has also held management positions at

the Ontario College of Art and Design and The Banff Centre. Kathleen has been the volunteer President of Toronto Artscape Inc. for the past three years during a period of explosive growth for the organization. She is also President of her consulting company Sharpe Culture.

Kim Tomczak

KIM TOMCZAK is a multidisciplinary artist primarily known for his work in performance, photography and video. Born in Victoria, B.C., he graduated with honours from the Vancouver School of Art (now the Emily Carr College of Art). He became a founding director of Pumps Centre of the Arts, in Vancouver, where he was involved in all aspects of fundraising and programming. In 1980 he moved to Toronto. His work has been shown extensively both nationally and internationally, including the Paris Biennale, the Canadian Cultural Centre in Paris, the Video Biennale in Vienna (where he received first prize for a tape co-produced with Lisa Steele)as well as the Musée des Beaux Arts in Montreal, Documenta 8 (Kasel, Germany) and the Centre Georges Pompidou (Paris). His work is in many collections including: the National Gallery of Canada, the Art Gallery of Ontario, the Vancouver Art Gallery, the Institute of Contemporary Art (Boston) and Trinity Square Video in Toronto. In 1982, he became a founding director of V tape, a national information and distribution series for independent video. He was a founding director of the Images Film and Video Festival, a founding director of the Audio Visual heritage Trust of Canada, a founding director of Beaver Hall Artists Housing Co-op and a past board member of the Oakville Galleries.

Rick Lash

RICK LASH is the National Expertise Director for the Haygroup's Management Development Practice. He has spoken widely on leadership development and organizational transformation and is a regular conference presenter. He has appeared on CBC's This Morning with Sheilagh Rogers and Workology. Rick has published numerous papers and book chapters on leadership and personal transformation including Taking the Inner Journey for the Ivey Business Journal and has written several articles for the Globe and Mail's Careers section; most recently Want Health and Happiness? Be Resilient and Middle-Earth at the Office.

Annex 4

Breakout Session Leaders

SESSION	LEADER	POSITION
Alexander Technique Class	Victoria Vasileski	Alexander Technique Coach
Peer Breakout Session 1	Carol Greyeyes	Indigenous Arts Advisor, Artist in Residence Consultant, Saskatchewan Arts Board
Peer Breakout Session 2	Ottie Lockey	Ottie Lockey Management, www.ottielockey.com
Peer Breakout Session 2.1	Andrew Taylor	Director, Bolz Center for Arts Administration, University of Wisconsin-Madison
Peer Breakout Session 3 and 4	Joysanne Sidimus	Executive Director, Dancer Transition Resource Centre
Peer Breakout Session 3 and 4	Catherine Smalley	Arts Program Manager, George Cedric Metcalfe Charitable Foundation
Peer Breakout Session 5	Jocelyn Harvey	Arts Consultant
Peer Breakout Session 6	Robert Sirman	Administrative Director, National Ballet School
B1 - Managing Change – New Tools for Managers	Beth Anderson	Director of Artistic Administration and Operations, Tafelmusik
B1 - Managing Change – New Tools for Managers	Tricia Baldwin	Managing Director, Tafelmusik
B2 - Arts Management 101	Melanie Fernandez	Director Community and Education Programmes, Harbourfront Centre
B2 - Arts Management 101	Natalie Lue	Director of Planning, Harbourfront Centre
B3 - Exploring Partnerships	William Moore	President, SOLUTIONSInk
B4 - The Changing Face of Arts Organizations	Rudi Quammie Williams	General Manager, Theatre Passe Muraille

B5 - Performance Management	Holly Seebach	Professor Business and Entrepreneur Division, Niagara College
B6 - Developing a Compensation Strategy	Mike O'Meara	Organizational Development Learning Instructor and Mentoring Co-ordinator, Niagara College
B7 - Organizational Self-Evaluation – Aboriginal and Culturally Diverse Arts Practices	Shadi Mogadime	Mogadime Marketing and Fundraising Group
B7 - Organizational Self-Evaluation – Aboriginal and Culturally Diverse Arts Practices	Jane Marsland	Consultant
Yoga Session	Ian MacDonald	Yoga Instructor
C1 - The Value of Mentorship	Deborah Andrews	National Director Mentorship Program, Canadian Film and Television Production Association
C2 - Surviving Transition	Lisa Steele	Creative Director, Vtape; Artist, Writer and Professor, University of Toronto
C3 - Occupational Health and Safety	Janet Sellery	Health and Safety Manager, Stratford Festival
C4 - Dealing with Challenge and Conflict	Clark Reed	NetGain Partners Inc
C5 - Organizational Self-Evaluation	Michelle Harkness	HR Consultant
D1 - Generational Diversity in the Arts	Jane Marsland	Consultant
D1 - Generational Diversity in the Arts	John Watson	General Manager, Theatre Direct

D2 – Working in Crisis?	Teresa O'Neill	Certified Professional Collective Coach Coaching Connections
D3 - Cluster Management	Christine Moynihan	Executive Director Dance Umbrella Ontario
D3 - Cluster Management	Lisa Nabieszko	Executive Director, STAF
D4 - Designing and Implementing an Internship Program	Karen Ennis	Administrator, Cultural Careers Council Ontario
D4 - Designing and Implementing an Internship Program	Bob Johnston	Executive Director, Cultural Careers Council Ontario
D4 - Designing and Implementing an Internship Program	Catherine Smalley	Arts Program Manager, George Cedric Metcalfe Charitable Foundation
D5 - Recruitment and Selection	Nina Small	Human Resources Manager, Ontario Arts Council
D6 - Human Rights	Neil Edwards	Director Mediation and Investigation Branch, Ontario Human Rights Commission

Annex 5

Conference Participants

Miriam Adams, Dance Collection Danse
Melissa Adamson, Toronto Children's Chorus
Fred A. Addis, Leacock Museum
Linda Albright,
Art Network for Children and Youth
Babek Aliassa, Bravo-Sud
Zainab Amadahy, Community Arts Ontario
Beth Anderson, Tafelmusik
Dolores Anderson, Mariposa In The Schools
Barbara Anderson-Huget, Theatre Ontario
Deborah Andrews, CFTPA
Susan Annis, Cultural Human Resources Council
Melanie R. Aquino, Classic Theatre Cobalt
Christine Ardagh,
The Artists' Health Centre Foundation
Roberto Ariganello,
Liason of Independent Filmmakers of Toronto
Ann Atkey
Anna Azrahimi Hamedani, University of Toronto
David Baile, Opera Atelier
Billyann Balay, Ontario Arts Council
Tricia Baldwin, Tafelmusik
Pierre Baliki, Stars Of Lebanon Theatre Company
Anthony Bansfield, Canada Council for the Arts
Alex E. Baran, Hamilton Philharmonic Orchestra
Jessica Baran, Dance Umbrella
Linda Barnett, Linda Barnett Consulting Services
Dave Barr, Centre for Cultural Management
Patricia Barretto, CanStage
Jill Battson, PoetBureau
Erika Beatty, Niagara Symphony Association
Kimberly Beaune, Simple Truth Theatre
Mimi Beck, Dance Works
Martine Becquet, Bravo-Sud
Nancy Bell
Sandra Bell, Arraymusic
Rose Bellosillo, Hot Docs
Erin Benjamin, Ontario Council of Folk Festivals
Christine Berg, CanStage
Monique Bertoli, Les Editions du Vermillon
Elizabeth Bihl, Canadian Music Centre
Anya Blake, South of 60
Brainerd Blyden-Taylor,
The Nathaniel Dett Chorale
Alain Boisvert, La Nouvelle Scène
Laura Bonfigli, Theatre Passe Muraille
Nathalie Bonjour, Nightwood Theatre
Majdi Bou-Matar,
The MT Space (Multicultural Theatre)
Margaret Boyd, Festival of Sound
Pat Bradley, Ontario Arts Council
Dian Marie Bridge, Playwrights Guild of Canada
John Brotman, Ontario Arts Council
Heather Burns, CanStage
Marian Butler, Manitoba Arts Council
Carl Cadogan, No Kee Kwee
Steven Campbell, Ontario Arts Council
Katherine A. Carleton,
Profit Arts Facility Finance Fund
Guislain Caron, Théâtre Français de Toronto
Tom Carson, Smile Theatre
Debra J. Chandler
Robyn Chan-Kent, University of Toronto
Thomas Chanzy, Théâtre Français de Toronto
Petra Chevrier, Images Festival
Laura E. Clark, Canadian Opera Company
Michael Code, The Banff Centre
Sandy Code, The Lindsay Gallery
Susan Cohen, Cultural Careers Council Ontario
Ella Cooper, Kaeja d'Dance
Helen Coxon, Orpheus Choir of Toronto
Shelley Crawford,
University Of Toronto at Scarborough
Alexandra A. D'Arcy
Krista Dalby, Ontario Arts Council
Laurie Davis, Prefix ICA
Andrea Dawber, Clay and Paper Theatre
Natalie De Vito, Mercer Union
Gayle Dempsey, Muskoka Place Gallery
Shere DiCiccio, Waterloo Community Arts Centre
Denise Dickin, The Assembly Hall, City of Toronto
Daniel Donaldson, Orchestra Canada
Donna Doxtator, Quinte Arts Council
Tammy Duncan, Showplace Performance Centre
Heather Dunford, School of Toronto Dance Theatre
Yvan Dutrisac, YDART
Dave Dyment
Diane Eaton, Ontario Arts Council
Neil Edwards, Ontario Human Rights Commission
Sue Edworthy, Theatre Passe Muraille
Catherine Emes, Queen of Puddings Music Theatre
Karen Ennis, Cultural Careers Council Ontario
Patricia Eton-Neufeld, Guelph Chamber Choir
Carol A. Feeney, Quinte Arts Council
Melanie Fernandez, Harbourfront Centre
Elisabeth Feryn, Gallery 96
Jennifer Filippelli, Theatre Passe Muraille
Lorraine Filyer, Ontario Arts Council
Helena Fine, Te Amim Music Theatre
Rebecca Fisseha
Shannon Fleming, Orchestra Canada
Maxine Francis, University of Toronto
Leslie Francombe, Carousel Players
Helena Frei, Independent arts manager
Sibyl Frei, Creative Management Project
Jeremy Freiburger, RBC Festival of Classics

T. Anne Frost
Gary Froude, Muskoka Lakes Music Festival
Kendra A. Fry, Cahoots Theatre Projects
Warren Garrett, CCI
Simone Georges, 4th Line Theatre
Mallory Gilbert, Tarragon Theatre
Rebecca Gimmi, C Magazine
John Goddard, Lorraine Kimsa Theatre
Brian Goldenberg, Markham Youth Theatre
Katherine Grainger
Jennifer A. Green, Kaeja d'Dance
Donna Greenberg, Ballet Espressivo
Justine Greenland Duke
Tanya Greve, Crow's Theatre
Carol Greyeyes, Saskatchewan Arts Board
Joanne Guillemette, La Galerie d'art d'Ottawa
Kirsten Gunter, Ontario Arts Council
Adam S. Guzkowski
Andrea J. Halwa, London Arts Council
Dale C. Hamilton, Everybody's Theatre Company
Amanda Hancox,
Dancer Transition Resource Centre
Michelle Harkness
Judy Harquail, CCI Ontario Presenting Network
Katharine Harris, Dance Umbrella
Liz M. Hart
Philip Hartwick, Theatre Passe Muraille
Deb M. Harvey, The Grand Theatre
Jocelyn Harvey, Consultant
Tiffany Harvey, Hill Strategies Research
Liz Harvey-Foulds,
Georgian Bay Folk Society/Live from the Rock
Julie Hastings, Guelph Jazz Festival
Sasha Havlik, Mercer Union
Sherri Helwig,
Arts Management, University of Toronto
Adam Herst, Canadian Arts Management
Jamie Hill, Theatre & Co.
Lynda Hill, Theatre Direct Canada
Shana Hillman, Dance Umbrella
Ruth Hoch, Toronto Dance Theatre
Glenn Hodgins, Ontario Arts Council
Camilla Holland, Volcano
Jane Howard-Baher, Inner City Angels
Julia Howell, Ontario Trillium Foundation
Jill Humphries
Maria Hupfield, 7th Generation Image Makers
Brad Hutton, Ontario Crafts Council
Michelle Jacques, Mercer Union
Tim Jennings, Roseneath Theatre
Elsa L. Johnston,
Association of Canadian Publishers
Robert D. Johnston,
Cultural Careers Council Ontario
Kay Kanbayashi, Canadian Music Centre
Zsuzsa Keleman, Jumblies Theatre
Heather Kelly, Heather Kelly Communications
Madeha Khalid, Soulpepper Theatre Company
Jonathon Knapp, Thunder Bay Symphony Orchestra
Sophie Kneisel, 4th Line Theatre
Kim Knox, Ontario Arts Council
Risa Kusumoto, University of Toronto
Maggie Kwan, Toronto Dance Theatre
Martin Lacelle, Centre Cultural le Chenail
Janice Lambrakos, Ontario Arts Council
Hannah Lan, University of Toronto
Leah Landriault, CanStage
Dennis Landry, Music & Film In Motion
Kim Larocque, Cultural Human Resources Council
Sandra Laronde, Red Sky
Rick Lash, The Hay Group
William Lau, Little Pear Garden
Sally Lee, Toronto International Film Festival
Elisabeth Leiss McKellar, Mohawk College
Josée Létourneau, Théâtre la Catapulte
Amanda Lewis,
Ottawa School of Speech and Drama
Cynthia Lickers-Sage,
Department of Canadian Heritage
Shannon Litzenberger, Canadian Dance Assembly
Ottie Lockey, Ottie Lockey Management
Arlene Loney, Ontario Arts Council
Pat Loughran, Charles W. Stockey Centre
Natalie Lue, Harbourfront Centre
Ian MacDonald
Carolyn Mackenzie, Consultant
Jean Malavoy, Canadian Conference of the Arts
Alexi Manis,
Liason of Independent Filmmakers of Toronto
Cheri Maracle,
Imaginative Film and Media Arts Festival
Marta Marin, Tant Per Tant
Cathy Marostica, CanStage
Ray Marshall, Academy Theatre
Jane Marsland, Consultant
Ingrid Mayrhofer, McMaster Museum of Art
Gillian McCann, Arzoo Dance Theatre/SAVAC
Penny McCann, Saw Video
Joely McEwan, CanStage
Charles McFarland, Great Canadian Theatre Company
Trish L. McGrath, The Word On The Street
Micheline McKay, Opera.ca
Scott McLeod, Prefix ICA
Megan McNally, CanStage
Brian Meehan, Museum London
Renee Mellow, MASC
Catherine Melville,
The Storyteller School of Toronto
Natalie S. Millett,
Salamander Theatre for Young Audiences
James Missen, Canadian Conference of the Arts
Roy Mitchell, Trinity Square Video
Shadi Mogadime,
Mogadime Marketing and Fundraising Group
Mélanie Mongeon, Réseau Ontario
Ann S. Monoyios, Ann Monoyios Productions Ltd

William Moore, SOLUTIONSink
Craig Morash, Tarragon Theatre
Rosalyn Morrison, Ontario Crafts Council
Christine Moynihan, Dance Umbrella Ontario
Sarah Mulholland, Ontario Crafts Council
Lisa Nabieszko, STAF
Colette Naubert, Ontario Trillium Foundation
Jonathon Neville, Imagiscape Theatre
Nadé Nixon, Association for Native Development in the Perfoming and Visual Arts
Yvette Nolan, Native Earth Performing Arts
Marilo Nunez, Nightwood Theatre
Mike O'Meara, Learning Dynamics/Niagara College
Teresa O'Neill, Coaching Connections
Meagan O'Shea, Dance Umbrella
David Olds, New Music Concerts
Virginie Ouellette-Berruel, Ontario Arts Council
Lata Pada, Sampradaya Dance
Edita Page
Cecelia Paolucci, The International Bach Festival
David Parsons, Ontario Arts Council
Anjali Patil, Department of Canadian Heritage
Paulette Pelletier-Kelly, Cultureworks
Joost Pelt, Black Tulip Inc.
Francine Perinet, Oakville Galleries
Claire Pfeiffer, Canadian Magazine Publishers Association
Jamie Phalen, Trinity Square Video
Lesley Phimister, CARFAC Ontario
Madi Piller, Toronto Animated Image Society
Joanna Poblocka, League of Canadian Poets
Paola Poletto, Design Exchange
Cristina Prinzo, Black Tulip Inc.
Erica Proudlock, University of Toronto
Piera Pugilese, Junction Forum for Arts and Culture
Ester Pugilese, Junction Forum for Arts and Culture
Susan Ramsay, Junction Forum for Arts and Culture
Merika Ramundo, Soulpepper Theatre Company
Clark Reed, Netgain partners
Elizabeth Reynolds, Toronto Arts Council
James Richardson, Third Wall Theatre Company
Kaija Robinson, Opera Atelier
Mary Rowe, Ideas That Matter
Carol E. Rowntree
Lyn Royce, Royce Public Images
Melanie Rutledge, Canada Council
Jason Ryle, imagineNATIVE Film + Media Arts Festival
Dominique Saint Pierre, Francophone MASC
Mario Sangaraille, Ontario Arts Council
Arlene Saunders, Elora Centre for the Arts
Heather L. Saunders, White Water Gallery
Jasmine Sawant, Sampradaya Dance
Joan Sax, Opera York
Heather Marie Scheerschmidt, Ottawa School of Speech & Drama
Doriana Schiavi, Dance Umbrella of Ontario
Debra Seabrook-Page, St.Thomas Elgin Public Art Centre
Holly Seebach, Niagara College
Kaen Séguin, Ontario Arts Council
Janet Sellery, Stratford Festival of Canada
Kathleen Sharpe, Ontario Cultural Attractions Fund
Chandra Siddan, Regent Park Film Festival
Joysanne Sidimus, Dancer Transition Resource Centre
Amela Simic, Playwrights Union of Canada
Camilla Singh, Museum of Contemporary Art
Robert Sirman, National Ballet School
Nina Small, Ontario Arts Council
Catherine Smalley, George Cedric Metcalf Charitable Foundation
Shelagh Smith, Bookbinders and Book Artists Guild
Mitchell L . Smolkin, Ashkenaz Foundation
Robin Sokoloski, Humber College
Renata Soutter, MASC
Rhoma Spencer, Theatre Archipelago
Nora Spinks, Work-Life Harmony Enterprises
Donna-Michelle St. Bernard, Native Earth Performing Arts
Michele Stanley, Toronto Animated Image Society
Stephanie Stavro, Les Amis Concerts
Lisa Steele, V tape
Allan Stein, Charles W. Stockey Centre
Tamara S. Steinberg, Art Starts
Jeff Stellick, Ottawa School of Art
Jini Stolk, Creative Trust
Urmas Suits, Charles W. Stockey Centre
Kerry Swanson, imagineNative
Lilita Tannis, Urban Arts
Jeanine Tartarian, Stars Of Lebanon Theatre Company
Andrew Taylor, Bolz Center for Arts Administration
Paul Templin, Hart House Theatre
Menaka Thakkar, Menaka Thakkar Dance
Rasesh Thakkar, Kalanidhi Fine Arts of Canada
Kim Tomczak, V tape
Andrea Toole, Prologue to the Performing Arts
Alice Toyonaga, School of Toronto Dance Theatre
Annie Tse, University of Toronto
Candice Turner-Smith, Consultant
Victoria Vasileski
Anne Wadano, University of Toronto
Peter Wambera, CanStage
Myles Warren, Ontario Arts Council
John Watson, Theatre Direct Canada
Alexa White-Hawley, The Nathaniel Dett Chorale
Victoria Wickett, North Bay Symphony Society
Erin Wilbur, Dancemakers
Rudi Quammie Williams, Theatre Passe Muraille
Dermot Wilson, Kennedy Gallery
Lascelle Wingate
Carolyn Wood, Independent mediator
Heather Wood, Toronto Children's Chorus
Greg Woodbury, Charles Street Video
Judith Young, The Amadeus Choir
Jahan Zeb, Immigrant Culture and Art Association
Joyce Zemans, York University

ONTARIO ARTS COUNCIL
CONSEIL DES ARTS DE L'ONTARIO

RE-GENERATION

THE HEALTHY ARTS LEADER

Report on the
Ontario Arts Council's
Arts Management Conference

Breakout Sessions

February 6 and 7, 2005

Prepared
by Carolyn Mackenzie

ONTARIO ARTS COUNCIL
CONSEIL DES ARTS DE L'ONTARIO

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BREAKOUT SESSIONS

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Breakout Sessions – Sunday, February 6, 2005

The materials reported for the breakout sessions were provided by session leaders and with the contributions of session recorders: Anna Azrahimi-Hamedani, Denise Bolduc, Pat Bradley, Robyn Chan-Kent, Lorraine Filyer, Maxine Francis, Rebecca Gimmi, Sasha Havlik, Risa Kusumoto, Cynthia Lickers-Sage, David Parsons, Erica Proudlock, Robin Sokoloski, Annie Tse, Carolyn Vesely, and Myles Warren.

Peer Breakout Sessions

Peer breakout sessions were designed to allow varying generations of arts managers to discuss and exchange ideas on issues that were relevant to their grouping.

Peer Breakout Session A 1, 2 and 2.1

Peer breakout sessions A1, 2 and 2.1 were designed for managers with 0 – 5 years of experience. The goal of these sessions was to develop a wish list regarding mentorship from an emerging manager's perspective.

The participants in each group were asked to network with a partner. Each participant then reported back to the whole group on their partner's behalf, answering the following questions:

1. What is your name?
2. What did you do for yourself today?
3. What was your best experience being mentored or being a mentor?

Each group then developed their wish list or thoughts on mentorship.

Peer Breakout Session A1 – led by Carol Greyeyes

The common themes in Session A1's wish list are the following:

- Desire not to bureaucratize mentorship.
- Ability to access a variety of mentors throughout one's career.
- Mentoring that supports personal and career development.
- Building mentorship exchanges that are reciprocal and are founded on mutual respect of the participants.
- Hands-on learning.

- Ongoing, flexible and long-term relationships that reflect varied learning styles and are measurable.
- Shadowing opportunities.
- Mentors who champion mentees.
- Networking opportunities.
- Providing support and constructive feedback.
- To be challenged and pushed beyond one's limits.
- Open and candid relationships.
- Part of everyday work, not outside of the work schedule.
- Respect for differences in style.
- Mentors who care about the person's entire well-being.
- A small workgroup of developing arts administrators and experienced arts professionals.

Peer Breakout Session A2 – led by Ottie Lockey

Common themes of mentoring: A good mentor

- Challenges you to think outside the box.
- Listens.
- Is supportive and helpful.
- Enjoys teaching.
- Loves to share their expertise and knowledge.
- Transfers past lessons and experiences.
- Gives tools and a foundation for mentees to learn and look at issues from a professional perspective.
- Treats mentees as an equal and with respect.
- Encourages mentee to push him/herself.
- Gives positive advice.
- Is not afraid to admit a mistake.
- Sets goals.
- Is fun.
- Is understanding when intern makes an error.
- Provides an ongoing relationship with the intern.

A mentor is beneficial because he/she can

- Increase the intern's confidence.
- Have the intern look at issues from a professional perspective.
- Have the intern emulate the boss's style.

Challenges seeking a mentor:

- Many from the group voiced they did not have a real experience or a positive experience from mentoring.
- They often seek mentors from friends.

- A formal mentoring program was suggested so interns will not rely on friends.

In conclusion, Ottie suggested asking questions, talking to people and mentioning your interest in mentorship in job interviews. At the initial meeting with a potential mentor it is important to get to know each other and determine what is required.

Peer Breakout Session A2.1 – led by Andrew Taylor

What does it feels like to be a mentor?

- Demonstrated by networking and introducing other group participants in the session's opening exercise.

Participant's voice:

- It is positive to have ongoing response and feedback.
- Keep asking questions – maintain heated interaction.
- Getting to know each other is important.

We want deeper mentorship; but what does that mean exactly?
Definition:

- Multi-directional.
- Long-term.
- Personal as well as professional relationship.
- Not necessarily integrated with career as with coaching.
- Spiritual – receiving of wisdom (not just skills).
- Holistic approach to both career and personal development.
- Spotting and nurturing the talent.
- Trust is an essential element for rapport.
- Inspiration to move forward for both parties.
- Shared experience – agreed on by both parties.
- Altruism – mentor may gain nothing but satisfaction.
- Are we calling "mentorship" what used to be "apprenticeship"?
- "Guardian angel" to help open doors.
- Business model: mentors select their mentees, to carry on their tradition.
- Mentors have nothing to gain or lose, they participate to contribute.
- Being a good manager does not translate to being a good mentor.
- Both parties benefit over the long term.
- Mentoring helps one learn about the younger generation.
- People mentor people – that is, individuals not organizations.
- Passing the torch and one's love of the business.
- Length of mentorship can be flexible, depending on needs of parties.
- Mentorship can bridge the generational divide in both directions.

- Can mentorship be government led? Possibly, but not a replacement for training.
- Good mentors have to be able to trust and pass along.

What is missing?
- Missing out on possible relationships by being narrowly focused.
- Size, cost and time restraints of many organizations (particularly small ones).
- Concern about the work getting done once committed to a mentorship.

What can we do?
- Networking and finding appropriate mentors.
- Without time or money to participate in training and professional development, mentorship becomes an important part of the sector's ecology.
- Funding is needed to coordinate and find mentors and mentees.
- Sharing of good practices: ad hoc groups of arts development people to discuss, explore, learn; there is always someone else doing just what you do.
- Support mentoring: peer-to-peer mentoring.

Peer Breakout Sessions A3 and A4 – led by Joysanne Sidimus and Catherine Smalley

Peer sessions A3 and 4 were held together. This group reflected managers who have 5 to 10 years' experience. This group was asked to identify areas of potential change in order to retain existing arts leaders in the system.

What was our expectation when going into this job?
- Steady income.
- Create support for artists.
- That it would never be boring.
- That the job would be temporary.
- Learn enough to self-produce.
- Work toward community building.
- Show relevance of art in the community.
- Make a difference and have a meaningful job.
- Help create jobs for artists.
- An opportunity for growth development in the job.
- To participate in the arts without having to be an artist.

What is the reality of the job?
- You define your reality. It is possible to make it happen if you want it to.
- Arts organizations are having a huge impact on smaller communities.
- Grants get cut, struggle with the government because they don't realize what art does.

- There are not enough human resources.

What are the challenges?

- It is difficult to sustain momentum, everything happens at a slow rate.
- The structure of the organization is always confusing. The company keeps growing but the administration is not fully supported.
- There are a lot of people who are arts managers and do not have a formal background in arts administration.
- It's difficult to find the next step within the organization. There isn't any leverage within arts sectors.
- Certain people felt that they get asked to sit on several boards and committees. Time is being taxed.
- An arts manager is expected to be proficient at many different managerial tasks. It is difficult to find the time to take courses.

GROUP BREAKOUT DISCUSSIONS:

What would you like to see happen in the future to energize the field?
What has to change? Who is accountable?

Group A:

- Long-term stability in administration staff.
- More feedback from funding bodies so that organizations know what is realistic and expectations are clear.
- Longer-term training grants.
- Dedicated funding for administration and operating.
- Time and money to put toward ideas and projects.
- Job sharing and/or paid sabbatical possibilities.
- Involve all stakeholders in order to support HR development.
- Longer-term internships.

Group B:

- Fear of change needs to be minimized (staff and Board).
- Ageism needs to be dispelled. There needs to be mutual respect between young and old.
- There needs to be a greater respect of time.
- Innovation and a sense of change will create momentum and fuel passion.

Group C:

- Non-financial compensation and benefits to staff.
- Access to professional development resources.
- Support organizations for artists – health networks.
- Raising profile and perceived value of the arts.
- Workable, flexible organizational structure.
- Sufficient human resources.

- Long-term mentorship and internships.

Group D:
- A better work-life balance.
- Challenge of seeing 10 years ahead.
- Develop a profile for arts managers. A job description.
- There should be ASO strictly for arts managers.

Do we feel valued?
- We should recognize and value arts administration the way artists value art.
- As artists we do administration when we can't do art – administration is not viewed as important or valuable.

Is it okay to be an arts manager?
- Attempts at making your organization a success are never-ending; there are always more grants to apply for and projects to do.
- Good governance plays a role in administrators being respected.
- Boards need to allow managers to manage.
- Careful Board development.
- Good arts managers know the artistic vision and know how to advance the vision.
- Undertake to communicate our needs and interests more clearly.
- Increased education early on would help in the future of arts management.
- Draft a job description for yourself and present it to your bosses, seeking input.
- Communication – and lots of it is essential.

Peer Breakout Sessions A5 and 6

Peer Breakout Sessions A5 and 6 were designed for managers with more than 10 years' experience. These groups were asked to identify strategies for a smooth transition into the next generations of arts leaders.

Peer Breakout Session A5 – led by Jocelyn Harvey

The session was organized into three parts, with participants discussing each point as follows:

Regarding experienced leaders who are leaving organizations, what are you looking for and are your environments providing for this?
- Suggestion to have retirees available in some capacity, perhaps as consultants:

    a. Are people forced to become consultants because they haven't received a living wage, are not able to retire?
- Suggestion to encourage people to be financially educated.
- It is also important to look at the barriers to leaving, such as retirement planning:
    a. Suggestion to incorporate RSPs into the long-term planning in institutions.
    b. Suggestion to use surplus funds for RSPs, but also suggestion to put RSPs directly into the budget.
    c. There is a need not to wait, but to treat employees professionally, and to treat their benefits as legitimate expenses.
- Preparing to retire means bringing in someone else:
    a. How do we make sure our successors can truly take our place?
    b. How do we make the transition smoothly?
    c. Is there money to pay for an overlap period?
- What happens if your Board of Directors (BOD) decides you should retire?
- Example of offering a five-year notice, start planning.
- Discussion on founder-based organizations when founder retires:
    a. Suggestion to create other positions to take over after artistic founders of organizations (seeing many organizations fail when artist founder retires).
    b. Often succession plan for the artistic directorship, but not the administrative/management side.
- Suggestion for organization to be financially prepared for the overlap:
    a. Bring in a change manager specifically for the interim period? This gives time to bring in new person or renew role or vision.

Regarding upcoming leaders, what do they need?

- Suggestion to look to other industries' recruiting:
    a. Hire and train young people to prepare them for succession.
    b. Have the mindset that you can give someone a chance, and begin preparing them.
    c. Suggestion that sabbaticals can offer good experience for upcoming leaders.
- Need to have clear policies, infrastructure and job descriptions in place for succession:
    a. Suggestion to add governance and succession to an annual planning checklist with the BOD.
- Should executive directors (EDs) present successors to BOD? Whose responsibility is it to raise the issue of succession planning?
    a. Everyone agreed that EDs or senior leaders are responsible for this.
    b. Everyone also agreed that boards may need to initiate the discussion of succession planning.

    c. How do EDs and BODs make sure that leaders *and* upcoming leaders go through leadership training programs?
- Discussion on legitimizing the field of cultural management:
    a. Is there a place for certification in arts administration?
    b. Participants were split on the merits of certification.
    c. Warning not to downplay professionalism in administration for finances, health, safety, etc.
- Discussion of organizations continuing; is the money there to start new institutions or organizations for young people to lead?
    a. Suggestion that younger generation looks to more virtual communities and collectives.
    b. If institutions were created to draw more resources together to promote artists' work, what happens when artists can do much of it themselves due to technology?
- Discussion of the difficulties of young managers:
    a. Especially in the visual arts, shallow structure organization where there is no expectation of succession.
    b. No middle management training ground in many organizations.
    c. Do cultural BODs tend to look at the CEO as a commodity, to perform or get out? Are new leaders brought from outside the organization?
- The complexity of organizations supports the shallowness of people's experience if they don't have the opportunity to develop new skills.
    a. See young leaders moving horizontally between organizations for experience.
- Should BODs look at durability as a liability?
    a. If senior leader is repository of all past information and history, what happens when they retire?
- Suggestion we might be nurturing too many arts managers, not enough money to spread around.

Regarding the point of view of the organization, what are we planning?

- Discussion about whether the organization meant the BOD or not? Do they listen to cries for help?
    a. Examples of people giving five- to ten-year retirement notices, what is done by the organization?
    b. Warning that BODs turn over, not to entrust all responsibility to them.
    c. Should ex-BOD members be approached for management positions?
- Need for ED/BOD to delegate responsibility to prevent the repository syndromes.
- What means are available to transfer the history and information of the organization?
- Suggestion to make policies to communicate with juniors:
    a. Start training with information so people know how their organization works.

b. Activate the finance and fundraising committees, so they know how to take on those roles.

- Everyone agreed that planning and communication are key to successions.

Peer Breakout Session A6 – led by Robert Sirman

Introduction

- All participants introduced themselves by name, occupation, basic training:
  a. Looking for connection between occupation and education/training.
  b. There are many ways to encourage young people to be leaders in the arts; they don't necessary have to be trained as arts administrators.
  c. Result: 2/3 of people in the session have been trained in the arts.
     1/3 of people in session have been mentored.

Issues of Succession (Human Resources):

- Difficult to find new people to work in difficult circumstances: excessive hours, low wages and benefits, high dedication.
- Work with passion, belonging.
- Over-dependence on specific leaders.
- How to make an organization inheritable.
- How do arts administrators give up control? "You can do it, but do it my way."
- Who wants to buy the existing commercial cultural assets?
- Founder's syndrome:
  a. When an entire staff consisted of two or three people it is difficult to find people who are experienced in that institution who can take over.
- Board recruitment (both professional and volunteer leadership).
- Who can afford to retire?
- Need for personal sanity.
- No assistant positions.
- Difficulty in keeping people long enough to assume leadership.
- Mindset of community:
  a. "Art = no prospect" perception.
  b. Lack of role models in the arts to inspire people.
  c. Need to inspire and attract people with passion, not money.
- Organizational mentorship: passing on mantel to new organization.
- Geographic: culture within cities and urban centres.

Proposals for Action

- Create the climate the next generation wants to work in.
- Develop the capacity to bring in more people, which is difficult in smaller organizations.

- Define desired competencies and credentials for positions reporting to the Board.
- Boards should do more succession planning for organization.
- Create assistant positions, from which the assistant will be chosen for succession.
- Create closer personal relationships with practitioners.
- Clarify position description: people can then know what the boards expect.
- Open up to other ways of working:
    a. New ideas, new goals.
    b. Think outside the traditional workplace sett (e.g., job sharing, telecommuting).
    c. Workers don't have to be arts-educated.
- Credentials: increase credentials and recognition of community in the arts.
- Be less afraid of other people knowing what we are doing.
- Learn from experiences of other sectors.
- Reinforce our professionalism.
- Emphasize "creativity" that can benefit other sectors.
- Artistic leaderships need to align with artistic vision and management of organization (requires investment of time and energy).
- Change Board's thinking and understanding.
- Make our jobs easier; make it attractive to replace and fill.
- Value your own time: budget for it.
- Create action plan to "push back" and relieve chronic crisis in the long term.
- Build changes in approach into strategic plans – this requires buy-in from artistic leadership.

Subject Breakout Sessions

B1 – Managing Change – New Tools for Managers – led by Beth Anderson and Tricia Baldwin

A Case Study of Tafelmusik's organizational expansion and the new tools required for those changes.

Please note that the templates for the "new tools" are available at the "Online Resource Centre" of the Orchestras Canada Web site at http://www.oc.ca.

Tafelmusik Baroque Orchestra and Chamber Choir
WELCOME
to
Managing Change:
New Tools for Managers
Sunday, February 6, 2005

Tafelmusik Baroque Orchestra
Jeanne Lamon, Music Director

Tafelmusik Chamber Choir
Ivars Taurins, Director

Areas of Artistic Activity

- Home Performance Season
- Touring – International, National, Provincial
- Artistic Partnerships
- Outreach and Community Partnerships
- Education
- Artistic Training
- Recording

Tafelmusik Eco-System – Our Family of Constituencies and Stakeholders
Tafelmusik – International Centre of Excellence in Period Performance

• Tour Agents and Presenters • Local Artistic Partners	• CD and Documentary Partners • Local and International Media • Radio/Television Broadcasters	• Education Partners • Artist Training and Orchestra in Residence Partners
• Government Funders (Canada, Ontario, Toronto arts councils and DFAIT) • Creative Trust	• Venue/Home Partners • Architectural Partners • Capital Campaign Partners	• Subscribers • Single Ticket Buyers • Individual Donors Corporate and Foundation Donors • Community At Large

CORE VALUES

Artistic Excellence

- Long-term, nurtured relationships
- Commitment to artistic mandate
- Artistic integrity in short- and long-term decision making
- Organizational excellence
- Fiscal responsibility

Desired Future

- We always want to be one of the best period performance orchestras in the world.
- We always want to attract the best musicians and arts managers.
- We want to have a great environment for our artistic-staff team with the proper resources to realize our vision.

Future Vision

In planning for the future in 2000/01, Tafelmusik identified its vision to be an internationally recognized centre of excellence for many generations to come.

We therefore realized the need to create:

- future world-class period performance musicians, and
- audiences for the future.

Expanding Activities

To create artists and audiences for the future, Tafelmusik developed programs to:

- train the next generation of period musicians
- expand the scope of recording activities
- expand artistic and community partnerships
- create audiences for the future
- build financial resources

Opening Doors to Tafelmusik

- More accessible, beautiful and comfortable home venue with superior acoustics.
- Artistic training and education.
- Multidisciplinary and cross-cultural festivals and programming.
- Satellite venue and community concerts.
- 24/7 access, ticketing, and learning through the internet.
- Increased international awareness.
- Audience development through television, recording and multimedia.
- Diversity initiatives.
- Opportunities to volunteer and get involved.

Challenges in Our New World

- **Price for worthwhile expansion** in artist training, education, community outreach was paid by a high level of stress on the staff and artistic team and turnover in operations staff.
- Tafelmusik was also dealing with transitional issues and **institutional knowledge loss.**

Defining the Problem:
"Ross's Respectful Suggestions"

Tafelmusik needed:

- a method to retain institutional knowledge of Tafelmusik-specific operational planning and procedures – with training, succession, job satisfaction and performance in mind
- better role definition in a matrix organization
- a centralized, shared information source vs. "siloed" file source and idiosyncratic planning/budgeting tools

- better project management tools/templates/prompts to handle expanded and high-volume areas of activities rather than reinventing the wheel each time an activity was planned (e.g., tour, runout) and forgetting details
- a better tie-in between strategic planning and operational planning.

Developing Solutions

- Artistic and administrative excellence and relationship-building have been the cornerstones of Tafelmusik's success.
- New tools offered an opportunity to close the gap between our vision and our operations:
    - Project Management Initiative
    - Human Resource Planning
    - Revised Job Descriptions more limited in scope, more reflective of standard arts job descriptions

New Tools

In a solution-finding mode, Tafelmusik applied for and received a grant for professional development in Project Management from the Cultural Careers Council of Ontario to work with Project Management Consultant Ross Smith.

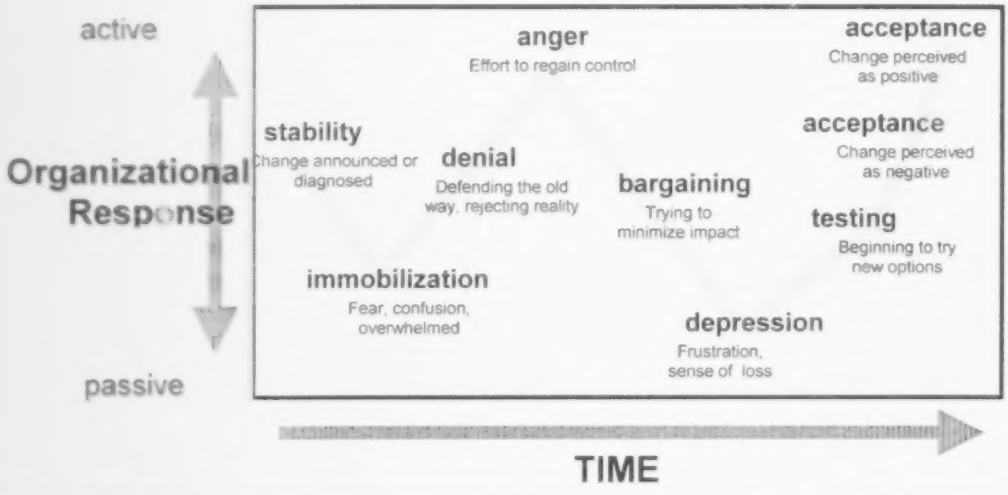
Key Principles of the Project Management Initiative

1. An arts organization's commitment to **artistic excellence** must be **matched** by a commitment to **organizational excellence**.
2. This Project Management initiative is consistent with the organization's values of creating a **nurturing, caring environment** for our artists, staff and volunteers and also with the goals and priorities set out in the strategic plan.
3. This Project Management initiative speaks to the **core strengths required** in the **quickly evolving environment**.
4. The need to acquire and develop human resources, organizational, **project management and coaching skills** is helpful to an arts organization's **continued success.**
5. Longer term, there will be a need for **"skills transfer" to succeeding staff.** Establishing a **permanent base of institutional knowledge** allows the arts organization to transfer to new staff a solid base of best practices.

The Response to Change

- Let's Do It!
  - I'm inspired, excited
  - I'm completely sold
- I'll Go with the Flow
  - I'm not sure but I'll go along
  - I like the change but can we really do it? How will we do it?
- Freeze
  - This will never work
  - I'll keep my head down and it will pass
  - I'll work on other priorities or interests
- Over my dead body
  - This is my turf
  - I will take action to prevent, to sabotage

The Response to Change



Project Management Templates

- Tafelmusik developed a number of detailed templates for specified projects that will prompt staff as to the work that needs to be done, when it needs to be done by and who does it/who is communicated to.
- This was especially important for touring as the level of detail is extensive and the information very specific to Tafelmusik. Instead of semi-reinventing tour

planning with each tour, the operations team can now pull up the template and adapt it for the specific tour.
- The model which seems to be most applicable is the GANTT chart which is basically an Excel spreadsheet with the activities, timelines and people involved outlined.

Project Management Templates

- Touring.
- Contracting.
- Joint Ventures with Opera Atelier.
- Tafelmusik Baroque Summer Institute.
- Marketing (Subscription and Single Ticket).
- Development/Fundraising.
- Special Event Gala.
- Volunteer Management.

Orchestras Canada Soundings Assessment 2003

- To help build a healthy future for orchestras, Orchestras Canada needed to create a national source of shared tools for best practices in arts management.

Sharing Our New Tools

To help developing administrative excellence in arts management, Tafelmusik has shared all project management models with:

- orchestras through Orchestras Canada (posted on the Orchestras Canada website – www.oc.ca)
- mid-sized arts sector through Creative Trust
- Schulich Arts and Media Program (MBA)
- Income Managers Program
- Waterloo Arts Administration Program

B2 – Arts Management 101 – led by Melanie Fernandez and Natalie Lue

A workshop designed for emerging administrators that offers an introduction to unions and professional associations, ASOs, agents and government agencies.

- These organizations are valuable resources, so it is in the interest of young administrators to create relationships with them.
- Arts administrators who decide they want to work with unions should be familiar with all relevant contracts.
- Some people believe unions are created out of necessity; however do they really address issues.
- Arts Service Organizations (ASO) mandates vary but the three key areas are to promote advocacy, professional development and communications networks. ASO also offers support such as job descriptions, and where to look for funding and other resources.
- Arts administrators should think in broader terms than their own discipline when it comes to ASOs because many of them work with multidisciplinary organizations.

Top Ten Issues of Arts Administrations

1. Funding – public sector.
2. Human resources – demand for volunteers, staffing overturns and unions.
3. Industry support.
4. Artist relationship – nurturing of.
5. Ongoing professional development.
6. Audience development.
7. Personal health – burnout.
8. Facility management.
9. Organization missions or goal.
10. Art form /Art – context.

Tips to finding funders

1. Look at programs, brochures from shows or/and events to find out who are the sponsors.
2. Look at corporations and foundations' Web sites.
3. Local businesses.
4. Arts councils – federal, municipal and provincial.

Art Funders: Government

DOCH	Department of Canadian Heritage
HRDC	Human Resources Development Canada
OTF	Ontario Trillium Foundation

MOC	Ministry of Culture (and perhaps at other issues-related ministries such as Recreation, Education, Francophone and Aboriginal Affairs)
DFAIT	Department of Foreign Affairs and International Trade

- Tourism funds through municipal and provincial governments.
- Youth project funding through social services (municipally) and Corrections Canada.
- Other foundations for northern communities such as Northern Development and Mines.
- Aboriginal employment, Aboriginal Business Canada.
- Casinos.
- Other foundations – Metcalfe, Laidlaw, McConnell, etc. – and corporate foundations – RBC, CIBC, Imperial Oil, Imperial Tobacco, etc.
- Foreign consulates.
- Other agencies, United Way, etc...

A handout, *Glossary of Canadian Arts Acronyms*, produced by Janis A. Barlow and Associates, was given to the session participants. The glossary can be found at http://www.barlowandassociates.com/Glossary%20of%20Canadian%20Arts%20Acronyms.PDF.

B3 – Exploring Partnerships – led by William Moore

A working session to explore and suggest ways to develop relationships and partnerships with business, community service organizations, individuals and government agencies.

The introduction to this session involved working with images:

- Working with "sense of self," draw your organization.
- How do you make connections?
    a. Computer.
- Connections with funders?
    a. E-mail or phone.
    b. Membership serve, publishing.
- Picture your position: (William stressed the importance of pictures.)
    a. Bubbles in the centre and interaction with other bubbles around – e-mail.
    b. Target with self in centre.
    c. Flower pattern with petals representing different HR components.
    d. Central circle with rays.
    e. Rectangle with organization, city, audience and schools at each corner and arrows indicating matrix flow to and from each corner internally and externally.

f. Not myself in the centre – but a function of getting audience to be part of you.

- William asked for stories:
  a. Everyone is what she "juggles" and tries to bring them all in.
  b. Building the family of various people from different groups.
  c. It is a line, where people are part of the line.
- Issue of "partnership" is that all of us are "creative" cultural workers:
  a. "Fodder" of economy – e.g., Microsoft workers are involved in the arts.
  b. Creative workers flocking to the centre of the economic cycle – why?
  c. Creative choice can be made by people who want to make a difference – choice is moved forward with communication.
- As culture workers we are strong in our ability to "read the feeling" – we are constantly reading the next reaction.

Session leader presentation is in borders, recorder notes are noted as addendum:

A working session to explore and suggest ways to develop **relationships** and **partnerships** with business, **community** service organizations, individuals and government agencies.

So what does this mean to you?

What do you want to know, to have happen?

Q: Session title – what does this mean to you? What do you want to know, to have happen?

A: We need workers, source, community, and time to network and revise.

- We have three types of people – each seeing the world differently:
  a. Artist / leader – sees the horizon, what is beyond.
  b. Crafter / connector – sees the middle road.
  c. Technocrats – look down.

Those of us who filled out the OAC questionnaire for this conference saw the question:

Are there any suggestions that you would like to make regarding subjects for working sessions or speakers?

To which I replied – in part...

What is most notable missing in your (OAC's) questions is the individual. Organizational success begins with the individual, as does its failure. A responsible HR plan will not make an institution viable. It will help, but it is not "it". It – is the person: the cultivation of the person, and the environment in which the person can make a difference. We are living in a new economy (yes, and there will be still newer economies) and the prototypic difference? – creative individuals are driving the bus. Creativity is the main economic force and creativity is intrinsic to success in business. People are the raw materials of a creative age. It is clear that arts organizations have flourished from the creative person. That person is usually thought of as the performer, the arts, the curator, the artistic director... but dig deeper, there are others. We need to invest in the basic creativity of individuals. Business is!

However, inward is not the only issue at hand in the "regeneration of the arts leader." The arts organization's relationship beyond its, let's say, container – is also vital. Thinking beyond the mandated artistic program and direction is often difficult. That program executed within a healthy organization by a capable and supported "arts leader" is truly a core competency.
A core competency, as well, is also the relationship of the organization to its larger "container" – its community. This is a pliant point; varying by the size of the community and the character of the program delivered. Nevertheless, I believe "a new working model" cannot be considered without earnest institutional commitment to a responsible, participatory, and creative relationship with community.

- Our communications and body language are tools.
- "Individuals are driving the bus"
    a. Each one of us wants to express ourselves within our organizations.
    b. We all have a lot to offer.
- However
    a. This is often difficult to support.
    b. This varies by size of community – "container" is what should be watched.

Key Words:

Container – Community – Relationship

Container

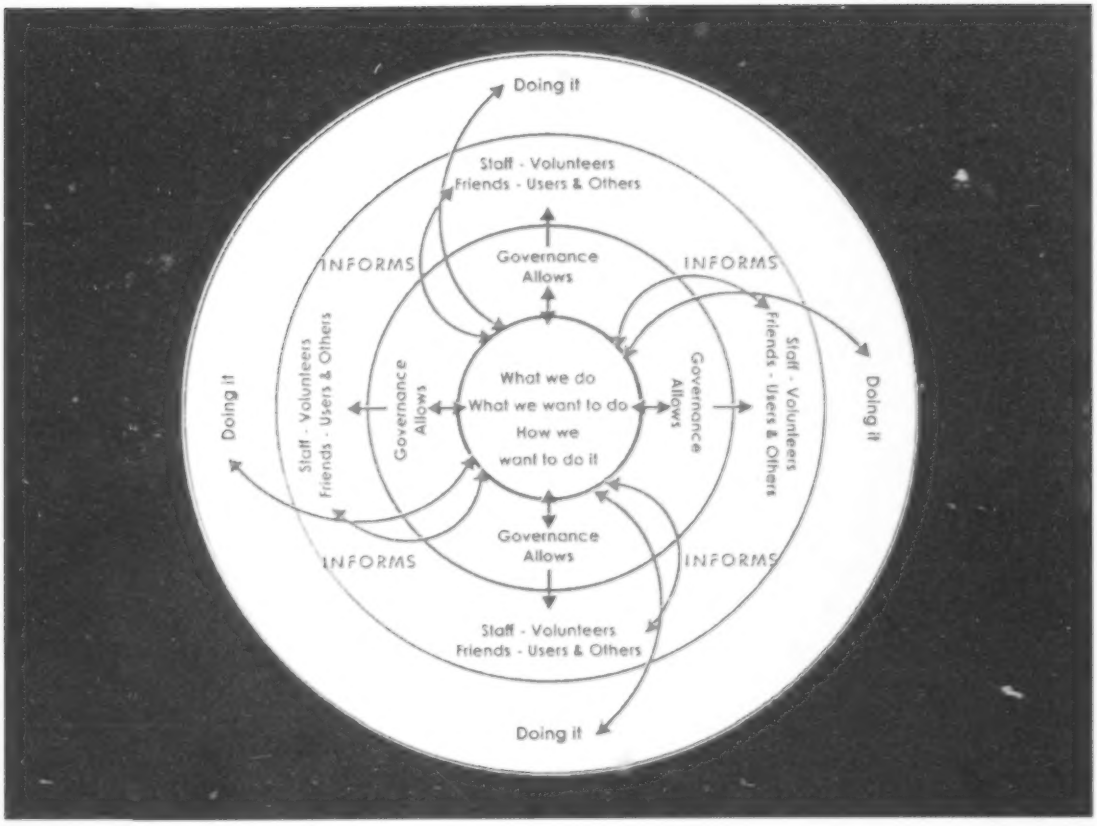
The Organization, your organization is the first container – think of it as the smallest doll in one of those Russian dolls within dolls folk-art.

Better still, think of yourself as the first doll nested in the next doll – your organization.

YOU and the next doll up are the container for **Meaning** of your Organization.

Meaning – some quick thoughts.

- We are in a container – that is in a larger container, e.g.,
  a. 1st container = family,
     2nd container = organization,
     3rd container = society.
  b. Artist,
  c. Stakeholder, i.e., everyone involved and who you are communicating to.
- Container is your organization:



Meaning

1. Meaning must be understood within the organization first – both in reality and where the organization wants to be.
2. Meaning is really a bundle of meanings – lots of things that the organization does, is mandated to do, and (very important) – **Believes in** – these become the organization's **Value.**
3. Value is meaning – and meaning is value *unpacked.*
4. The "brand" (whatever is used) is one of the containers for those meanings and should be able to be associated to Meaning in terms of Value.
5. Gender, class, age, ethnicity, lifestyle cannot be ignored in managing meaning – each decade is a mini-culture; so approaches and connections always need reconsideration.
6. The Meaning toolbox includes product (or value) identity that is associated with an image like – "your branding," that in turn should invoke Value.
7. But it will not unless there are shared beliefs implicit within the organization.

8. Meaning includes connection rituals – principally the *Rituals of Exchange* (how you connect); *Rituals of Possession* (how your organization becomes mine), and, the last is a hard one and can be thought of as adding to the previous – *Rituals of Divestment* (ownership, the giving of the organization to its users and supporters – involvement, participation , it IS theirs!)
9. Ritual meaning is the conversion of the culture of the organization (what it believes, what it does, what it makes, what it wants to do, how it wants to connect, and how it is perceived, how it is good, what is at its soul) into communication and connection by way of an identity – i.e., a brand.
10. This conversation connects the organizational culture with the community or user culture.
11. Users/supporters want meaning: What does your organization mean? (to us, to me and they to me, me to them) and what can it do for me; and perhaps strangely – how is it me, mine (*rituals of possession and divestment*)?
12. Communications is the choice of delivery to create meaning transfer – to gain support, user involvement, and use of service that also results in meaning converted into branding, or: *The containerization of meaning.*

Notes regarding point 10:

a. Offer what others may benefit from getting from you – allow them to say what they need.
b. The telling is necessary for your organization to move on with others.
c. By communicating vision to each other, you must look closely at your own.
d. Know who you are speaking to and be nice to them.

End Result

All you do
Is an opportunity
For all those you have a relationship with:
Audience, users, supporters, volunteers, staff, funders,
Stakeholders, community, business,
Government...

The Goals

Increasing experience and the flow of information (Exchange)
Increase time people are involved (Duration)
Increase ways to participate (Diversity)
Increase contributions of time, expertise, and/or money (Depth of Commitment)
Increase the continuity of connection and association (Ownership)

A gathering of place

house = organization

Inside I Keep My... Stuff
Outside I Keep... Community

Relationship

Land lies in water; it is shadowed green.
Shadows, or are they shallows, at its edges
Showing the line of long sea-weeded ledges
Where weeds hand to the simple blue from green.
Or does the land lean down to lift the saw from under,
Drawing it unperturbed around itself?
Along the fine tan sandy shelf
Is the land tugging at the sea from under?

The Map, Elizabeth Bishop, 1935

Whose Environment Is It Anyway?

I am going to use some visual art and artists as examples today.

One thought of environmental sculpture or art is that it looks at the natural world as both subject and object. Using, often as a source, the natural materials of place, its mode is to explore the ecological, social, and even spiritual meanings of the environment. Environmental art, when it works, serves as a means of reflection upon our changing relationship with the space around us – our place.

That reflection asks questions about us, about place, and about art and its place in us. There are two responses at work: that of the artist and his or her relationship to the work, and; that of our own and the imposition of the work within "our" space. Each has a context, and it is in the work that they join. Both rely on representation but from different viewpoints.

Environmental art plays with the texture of the things of place along with the texture of the place itself. It becomes a language (or perhaps better, the lack of a language) in situ. Its act of portrayal becomes a negotiation between the real and our response to that reality.
This would seem true of all art – that the gap between the world and its representation lies in the relationship between language and objects; but words are less shaped by their relationship to objects than by their kinship with other words.

- What we create is ourselves and our perception of ourselves.
- What is in a community?
    a. A sense of place that deals with history and the environment.
- We are the image, living with image – communities can come together with images and art objects.
- How do we make the future different from the past?
  By bringing the outside in and moving art out into the community.

B4 – The Changing Face of Arts Organizations – led by Rudi Quammie Williams

A working session to discuss the evolution of the arts community to include a greater number of independent artists, artist-run centres, collectives and small non-profits. The discussion identifies the challenges that the sector needs to address in embracing and supporting these changes.

What is changing the face of arts organizations?

- Audiences are driving change.
- Canada is one of the fastest changing countries in the world.
- Diversity has created great change.

What challenges are organizations facing in terms of change?

- Cultural appropriateness:
    a. Difficult to find qualified administrators that fit into the organization's cultural criteria.
- Lack of infrastructure to support diversely structured organizations:
    a. Room for professional and amateur artists and art organizations, but nothing in-between.
    b. Structure of the organizations continually changing and looking at what else was needed to grow.
- Archaic Laws and Censorship:
    a. Difficulty with censorship.
    b. Limiting organization in audience development.
- Rapid growth – outruns funding:

    a. Difficult for funders to keep up.
- Non-traditional work arrangements.
- Arts-business hybrids:
    a. For-profit ineligible for funding.
- Cross-generational staff and Board; increased diversity:
    a. Youth program to encourage young people to sit on the Board and committees.
- Quickly changing technology:
    a. Difficulty keeping up with new media because of rapid change of technology.
    b. More capital expenditures required.
- Balancing Board with artists.
- Changing career paths for artists:
    a. Career paths evolve rather than develop and grow.
- Increased demands on the administrator. Where is funding coming from?
    a. Government funding is increasing, fundraising is decreasing.
    b. Joint ventures.
    c. Outsourcing: hiring fundraisers.
    d. More corporate sponsorship.
- Small arts organizations play a bigger role in developing new artists and administrators.
- Disparity between concerns of large and small arts organizations:
    a. Ability to offer professional development.
    b. Ability to offer benefits.

Growth vs. Funding

- Corporate sponsorships are vital.
- Creative ways to fund without hiring.
- Money is taking precedence over art.
- Avenues for funding culturally diverse artists outside conventional perception of their culture.
- Time for a paradigm shift.
- Who does the training? Who has the HR budget? Who can offer the incentives?
- Your arts organizations work outside traditional structures and are therefore seeking different funding.
- Organizations are finding new ways to work and new ways to frame their work for funders (collaborations, ad hocs under NFP, service organizations).
- Funding bodies are responding to changes in arts organizations with new programs, despite no new money.
- Interdisciplinary arts abound.
- Different governance models.
- Small organizations fit into newly mandated programs imposed on large organizations.

Developing Human Resources

- Formalize volunteer management, recruitment and use.
- Use of non-monetary incentives.
- Use volunteer base as a succession base.
- Interns and co-op students to become long term and be repeated.
- Barter time and skills with other organizations.
- Collectives and collaborations.
- Mentorships.
- Cluster management.
- Shared resources and staff between organizations.
- Build a useful community.
- Organizational collectives.
- Shared boards.
- Associations to act as advocates.

B5 – Performance Management – led by Holly Seebach

A workshop to introduce various methods of performance management and their value.

Learning Objectives of Session

- Learning workplace-related information.
- Learning current practices and thinking and trends.
- Learning how to manage human resources in an expanding environment.
- Learning new ideas and suggestions.
- Learning new skills in human resources.
- Learning performance management in volunteer sector.
- Definition of performance management.
- How to implement and execute performance management.

Challenges

- What qualifies the Board members as employers? What qualifies them to assess performances of staff?
- 360-degree feedback:
    a. Get feedback from client, peer, managers, self, subordinates.
    b. Subjective, confidentiality issues, time-consuming.
    c. Can introduce problems to organization.
    d. Shouldn't involve compensation (avoid higher stakes).
    e. Missed opportunity.
- Lack of human resource professionals in organizations.
- Need solid analysis to come up with compensation and job descriptions.
- Assessment is an ongoing process:
    a. Assess on a daily basis.

b. Develop relationship and trust.
c. Document everyone's performance.
d. Each individual keeps track of his or her own performance by filing performance evidences.

Strategies:

- Management by Objective:
  a. Goals need to be "**SMART**"
     i. **S**pecific,
     ii. **M** easurable,
     iii. **A**chievable,
     iv. **R**ated/**R**ealistic,
     v. **T**ime-bound.
- Feedback:
  a. Specific (the more specific, the better).
  b. Sincere.
  c. Objective.
- Managing volunteers:
  a. Know their goals.
  b. Coach gently.

Session leader presentation is in borders, recorder notes are noted as addendum:

Performance Management at a Glance
Presented by: Holly Seebach,
Principal, Learning Dynamics
Coordinator, HR Programs Niagara College of Applied Arts and Technology

Performance Management

- ✓ Challenges in Performance Management
- ✓ Terms & Concepts
- ✓ The Process
- ✓ Performance Appraisals
- ✓ Challenges with Appraisals
- ✓ Performance Development Plans

Performance Management Challenges

What are the challenges your organization faces related to performance management?

Performance Management

Performance Management is an ongoing process that identifies an organization's vision and objectives, installs organizational and individual performance standards and ensures these standards using systems and procedures that are well integrated with organizational culture and practices.

Why Performance Measurement?

- Focus on "results/outcomes" rather than behaviours and activities
- Helps the employee understand his/her role in the "bigger picture"
- Depersonalizes issues
- It tells the employee what results (outcomes) are expected of him/her
- Ensures equitable treatment of employees
- Optimizes organizational operations
- Focuses on the employees' contributions to the overall goals of the organization
- Supports ongoing communication, feedback and dialogue about organizational goals
- Performance is seen as an ongoing process rather than a one-time event

ADDENDUM NOTES

- Emphasizes long-term results and outcomes.
- By knowing the "big picture," staff can utilize resources in a way that can support the entire organization.
- Allows staff to judge whether he or she is performing well.

- Integrates performance assessment into jobs on a daily basis (lowering anxiety).
- Optimizes effectiveness, productivity, performances.
- Recognize and appreciate efforts and successes.

Why Measure Results?

- What gets measured, gets done.
- If you don't measure results, you can't tell success from failure.
- If you can't see success, you can't reward it.
- If you can't reward success, you are probably rewarding failure.

Exemplary Performance Management Processes

Include ...

- Performance planning
- Environments that foster high performance
- Regular performance reviews
- Performance development plans
- Integration of individual, team and departmental performance with organizational objectives and strategies

ADDENDUM NOTES

- Learning is the foundation of achievement.
- Mini-reviews on a quarterly basis allow flexibility in performance planning.
- Adjust planning whenever changes in organization occur.
- Every action needs to be aligned to goals and aims of the organization.

Performance Appraisals

The process of evaluating an individual's performance after a specific period of time or completion of a specific task cycle or set of duties

Performance Appraisal Errors

What kinds of errors are commonly made during the performance appraisal process?

- Subjective performance measures

- Leniency errors
- Severity errors
- Halo errors
- Central tendency errors

ADDENDUM NOTES

- Subjective Performance Measures: need to measure subjectively, because each job is different and entails different levels of skills.
- Leniency errors: tendency to perceive the job performance of ratees as especially good.
- Severity errors: tendency to perceive the job performance of ratees as especially ineffective.
- Halo errors: use a rating assigned to one job dimension to rate several other dimensions.

Performance Assessment Tools

- **Rating Scales:** a subjective evaluation on a number of job-related dimensions on a scale of low to high
- **Checklists:** a selection of statements and adjectives describing employee's job-related performance and behaviour
- **Critical Incident:** requires the rater to record statements that describe employee behaviour related to job performance
- **Behaviourally Anchored Rating Scales:** an attempt to reduce subjectivity and biases by focusing on specific and critical work behaviours rather than on traits and personality characteristics
- **Field Review:** a skilled representative of the performance management department goes to the actual job situation and assists with the ratings
- **Self-appraisal:** requires the individual to evaluate one's own past and present performance and knowledge
- **Management by Objectives:** goal-directed approach whereby employee and manager jointly establish and assess performance goals

ADDENDUM

- Critical Incident: requires recording of all behaviours – a flaw may be not being able to capture all traits and behaviours.

Principles of Evaluation

- **Fair & Reasonable**
  - No surprises
  - Objectivity: Evidence
  - Tied to articulated goals and expectations
  - No single-person opinions
- **Process**
  - Not an event
  - Clearly articulated
  - Involving the right people
  - On a mutually understood basis
- **Time and Timing**
  - Sufficient, scheduled lead time
  - Sufficient, scheduled time to accomplish the process
  - Scheduling at appropriate times

The Performance Appraisal Process

- The employee should complete his/her own performance appraisal, and you as the manager completes one for the employee (another approach is to work together and complete the performance appraisal)
- Set up a time with the employee to review his/her performance
- Ensure that you create a comfortable environment for the process
- Give the employee a chance to articulate how he/she sees his/her own performance
- Articulate how you see his/her performance and go through the evaluation process
- Set goals and date for the next review period

Performance Development Plans

- Ask employees to articulate their career goals and interests
- Offer employees opportunities in order to help them achieve their personal goals
- How can employees go about developing their knowledge, skills and abilities?
- What traditional and non-traditional opportunities exist?

A Final Thought!

Performance management is an ongoing process whereby you and your employee together establish and prioritize goals that will help your employee and organization grow and develop!

B6 – Developing a Compensation Strategy – led by Mike O'Meara

A workshop to explore the rationale behind a fair compensation strategy.

Questions/Issues addressed by the session leader:

- What participants are willing to learn from the workshop.
- How to deal with staff management and pay raise.
- Compensation package for small organizations.
- Compensation in the arts sector and challenges.
- How to tie compensation with performance evaluation.
- Developing salary ranges.
- Professionalize the community to articulate the proper compensation for staff.
- Salary ranges and compensation(benefit packages) for staff on contract and volunteers.

What types of compensation do people currently receive?

- Salary.
- Health and dental plans.
- Vacation time.
- Professional development.
- CPP.
- RSP.
- Contract agreement.
- Financial incentives.
- Complimentary tickets.
- Staff discounts.
- Flex time.
- Life-style account.

Starting Place

To design a compensation package you should first go back to organizational culture and attitudes and values.

Session leader presentation is in borders, recorder notes are noted as addendum:

Compensation Management

The 1st and most important step is
"Developing a Compensation Strategy"

Compensation Strategies Your Own Experiences

- *Think about the organization that you work for (or an organization that you have worked for in the past. What types of compensation + rewards are offered by the organization?*
- *Is the base pay the same for employees in the same job category? If different, why?*
- *Is the total pay the same for employees in the same job category? If different, why?*
- *Why are the rewards important for you? For the organization?*

Compensation

Refers to all forms of financial returns and tangible services and benefits employees receive as part of an employment relationship

Objectives of an effective compensation strategy

- To attract individuals with the knowledge, ability and talents demanded by specific organizational needs
- To retain valued and productive employees
- To promote specific job behaviours conducive to higher levels of job performance
- To promote attitudes conducive to loyalty and commitment to the organization, high job involvement and job satisfaction
- To stimulate employee growth that enables the employee to accept more challenging positions
- To comply with the requirements of pay equity and related laws

Forms of Pay

Total Compensation + Relational Returns = Total Returns

Total Compensation

- *Benefits:* Income Protection, Work/Life Focus, Allowances
- *Cash Compensation:* Base Pay, Merit/Cost of Living, Short-term incentives, Long-term Incentives

Relational Returns

- Recognition & Status
- Employment Security
- Challenging Work
- Learning Opportunities

The Pay Model

Strategic Policies	Techniques	Strategic Objectives
Alignment	**Internal Structure** Work Analysis, Descriptions, Evaluation/Certification	**EFFICIENCY**
Competitiveness	**Pay Structure** Market Definition, Surveys, Policy Lines	**FAIRNESS**
Contributors	**Incentive Programs** Seniority Based, Performance Based, Merit Guidelines	**COMPLIANCE**
Administrations	**Evaluation** Planning, Budgeting, Communication	

The Pay Model

- *Strategic Policies* – It's critical that all policy decisions reflect the organization's values and culture
- *Strategic Objectives* – Objectives guide the design of the system + set standards for evaluating effectiveness of the system.
- *Pay Techniques* – It's equally critical to ensure organizational values and culture are taken into consideration and implemented in a consistent manner.

Things to Consider

- ***Internal Alignment*** – comparisons among jobs or skill levels inside a single organization
- ***External Competitiveness*** – relative to the competition: how much and what form?
- ***Contributors*** – relative emphasis on performance (relates to attitudes and work behaviours)
- ***Administration*** – in order to achieve its objectives, the pay model must be managed properly
- ***Efficiency*** – performance, quality, customers and stockholders, controlling labour costs
- ***Fairness*** – fair treatment for all employees by recognizing employee contributions and employee needs (procedural fairness relates to the processes used to make decisions about pay)
- ***Compliance*** – conforming to federal and provincial laws and regulations

ADDENDUM NOTES

- Internal alignment: ensure you are paying for the skill level – not for the indivi dual in the job.
- Contributors: the reaction to various situations is key.
- Administration: surveys, opinion polls are useful tools
- Judgement is made on perceptions of reality not of reality itself.
- Procedures for compensation should be documented.
- For clear compliance, know your strategies well.

Pay Techniques

- ***Internal Alignment*** – work analysis, job descriptions, evaluations and certifications
- ***Pay Structure*** – market definitions, surveys and policies
- ***Incentive Programs*** – seniority, performance, merit guidelines
- ***Evaluation*** – planning, budgeting, communications

ADDENDUM NOTES

Internal Alignment

- Keep job descriptions up to date.
- Carry out regular and documented performance reviews, agreeable to both parties.

Incentive Programs

- Develop a focus group.
- Merit guidelines based on improving efficiency.

Strategic Perspectives

Corporate Objectives, Strategic Plans, Vision and Values
What business should we be in?

Business Unit Strategies
How do we gain and sustain competitive advantage?

HR Strategies

Strategic Compensation Decisions
How should total compensation help gain and sustain competitive advantage?

Factors Impacting Compensation Strategies

- External Sources:
  - *Economic Conditions*
  - *Technological Changes*

- *Government Regulations*
- *Union Expectations*
- *Sociocultural Climate*

- Internal Sources
  - *Internal Work Culture*
  - *Business Strategies*
  - *Product Life Cycle*

ADDENDUM NOTES

Internal Sources
- Internal Work Culture: know the diversity of your workforce.
- Business Strategies: realize the value of your employees.
- Product Life Cycle: design your compensation package according to your product cycle.

Managerial Strategies and Compensation Systems

- *Classical Approach:* people are inherently lazy and dislike work, people will only work by creating circumstances under which their needs will be threatened
- *Human Relations Approach:* agree that people dislike work; however, believe people can be motivated by appealing to their social needs, recognize the role of peer group influence, treated fairly, positive employee norms will develop
- *High-Involvement Approach:* if jobs are structured correctly, people will enjoy their work and be motivated intrinsically by it

Questions and Thoughts
- Applicability to small organizations:
  a. Expand responsibilities.
  b. Offer diversity in tasks.
  c. Cross-training.
  d. Involve employees in decision-making process.
  e. Ensure employees are stimulated.
- Constant feedback from employees is necessary in developing compensation strategies.
- Relational Returns:
  a. More tangible.

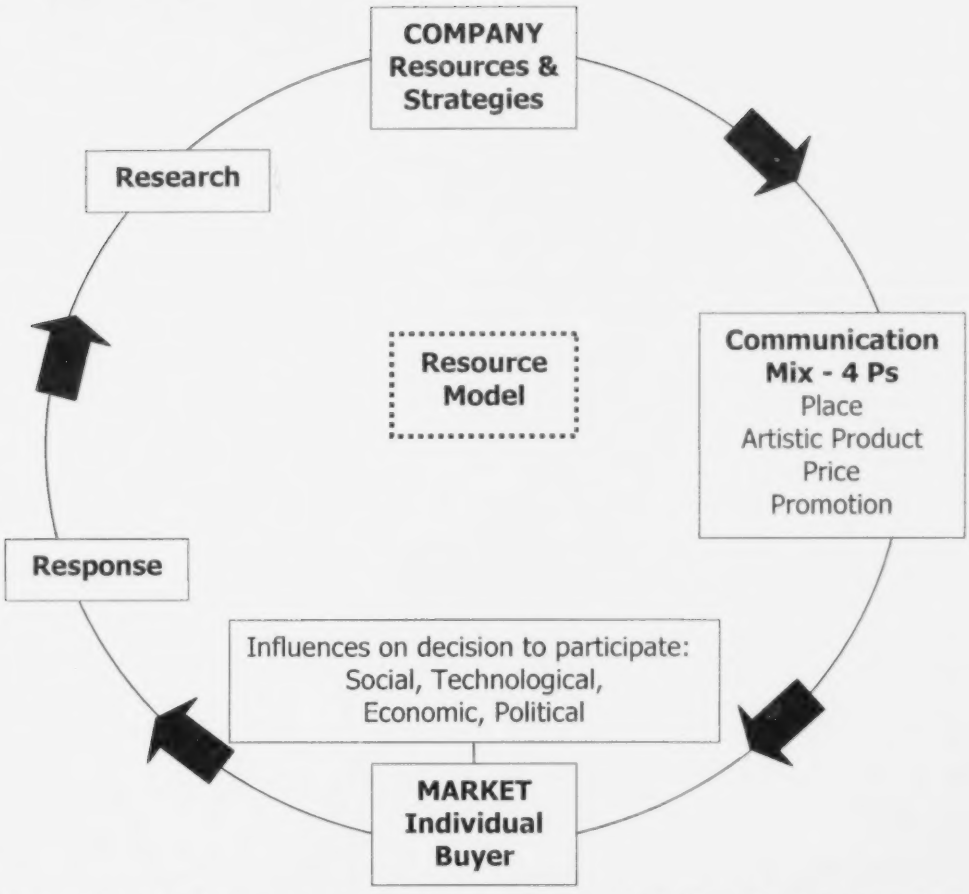
    b. Employee empowerment – by involving them in organizational strategies.
    c. Challenging work.
- For organizations with employees in different geographical regions: compensation differences must be legitimately reasoned by open communication with all those affected.
- The budget controls pay strategy, possibly resulting in
    a. Guilt.
    b. Helplessness.
    c. Reactive shift in strategy.
- General "Compensation Policies" should replace "Raise Policies" because sometime you can't meet raise policies.
- Involving staff in developing their own compensation package involves them in organizational health.

B7 – Organizational Self-Evaluation – Aboriginal and Culturally Diverse Arts Practices – led by Jane Marsland and Shadi Mogadime

A workshop to explore organizational self-evaluation with people involved with Aboriginal and culturally diverse arts practices.

Three self-assessment models were offered with the qualification that they are just models; any form of self-assessment requires reflection to ensure it works for the individual organization. Participants were encouraged to use elements from their own unique cultures, visions and art forms to shape their self-assessment. The three models are Resource Model, Template for Knowledge-based Assessment, and an Organizational Self-Assessment Checklist.

1 – Resource Model



The Resource Model, presented by Shadi Mogadime, is designed to be a practical aid in developing strategies. For this model to be effective, an organization must have both a clear sense of its goals and a realistic understanding of its current situation. This model allows an organization to see its resources and goals in relation to its external environment and factors.

Jane Marsland presented a self-assessment tool that she and other mid-sized performing arts managers developed. In order to successfully carry out an organizational self-assessment, a clear definition of values and purpose are critical. Self-assessment is an internal, subjective, and overarching process that is knowledge-based, whereas an evaluation can be either internal or external and is done at certain points in time or on a body of work to determine specific value. Successful self-assessment allows for organizations to be complex and adaptive.

This model can be implemented by means of interviews with staff and stakeholders. Each indicator is rated on a scale of 1 to 100 by the participants. Results can be plotted into the scale provided (Evaluative Baseline) to indicate patterns.

2 – Template for Knowledge-based Assessment

The *Creative Trust for the Arts* is designed to help arts organizations become healthy, balanced, productive, confident and self-reliant. We believe that organizations will be able to take full advantage of the Creative Trust Working Capital Awards if they have the artistic and operating wherewithal to maintain and replenish key resources of support for the artists, organizational processes and artistic works.

In assessing organizations for the *Creative Trust for the Arts*, and indeed in the Healthy Balanced Organization working process itself, we will focus on a number of key characteristics, internal operating capacities and behaviours that, taken together, provide the healthiest and most balanced working framework for an arts organization. We believe that these characteristics, capacities and behaviours are essential for maintaining and sustaining a healthy, balanced and productive arts organization over time. A critical component of this process is the prerequisite for the professional leadership to apply their knowledge of their organization to be able to position themselves accurately with regard to each element. Organizations will be considered "ready" for working capital awards based on how well each has addressed the elements of an organizational template.

I – LEADERSHIP, VISION AND RELATIONSHIPS

Leadership

A Professional leadership – Artistic Director and General Manager

A1 Professional leadership is in place, leading and directing the organization.

A2 The professional leadership is acknowledged and supported by staff and Board.

A3 The Artistic Director and General Manager have a shared understanding of the vision, purpose, values, and beliefs of the organization.

B Board Leadership

B1 Appropriate Board leadership is in place, leading and directing the Board in appropriate ways.

B2 Board members understand and support the artistic vision and mission of the organization.

B3 Board members understand the role of the Board as well as their individual roles on the Board.

B4 The Board been well cast and functions in appropriate and effective ways.

B5 Board members have made a commitment to the organization by articulating what they will do to assist the organization achieve its mission and what they will give as a personal donation.

C Vision/Values/Mission

C1 There is a clear articulation of vision, values and mission of the work and the organization.

C2 The Artistic Director is able to articulate clearly why the organization should exist and what makes it unique.

C3 The Artistic Director is able to clearly describe the philosophic and aesthetic values that underlie the artistic choices for the creation, production and/or presentation of artistic works.

C4 This information is clearly communicated internally and externally.

Relationships

There is a commitment to developing and maintaining quality relationships, both internally among the organization's professional staff and Board and externally with community partners and audiences.

D Internal Relationships

D1 There is a shared sense of purpose among professional staff along with a clear understanding of the values and beliefs that inform how everyone works together.

D2 The organization has a distinct working culture that is shared by the artistic, administrative and Board centres.

D3 The Artistic Director and General Manager have an excellent working relationship.

E External Relationships

E1 There is a commitment to developing and maintaining quality relationships with other arts organizations and key partner organizations in the community.

E2 There is a commitment to developing and maintaining quality relationships with the audience and donors and patrons of the organization.

E3 The Board of Directors is well cast from the community and develops and maintains supportive relationships with key community members.

II – WORKING FORMAT, THE ORGANIZATIONAL EQUATION AND INFRASTRUCTURE

F Working Format

F1 The working format—whether it is project based or operational—reflects the defined and understood processes of collaborating, planning, analyzing needs and problems, strategizing, problem solving, decision making and taking action.

F2 The format is informed by and consistent with the professional leadership's artistic, programming and/or curatorial processes.

G The Organizational Equation/Balance

G1 There is a clear understanding of the organizational equation and the critical balance between programs and activities and available human, financial, time, material and technical resources.

G2 There is a clear and coherent understanding of the condition of the equation at any given time.

H Infrastructure

H1 Organizational structures and systems are appropriate and adequate to the work in place and working effectively.

H2 Appropriate management, financial and information systems are in place.

H3 Appropriate and adequate strategic support systems for earned and contributed income programs are in place.

H4 There are appropriate human resources with necessary attributes and skill sets to maintain a healthy organizational operation and balance.

III – EFFECTIVE PLANNING AND LEARNING PROCESSES

I Working Processes

I1 There are clearly described, defined and understood processes for collaborating, analyzing needs and problems, strategizing, solving problems, making decisions and taking action.

I2 The working processes are informed by and consistent with the professional leadership's artistic, programming and/or curatorial processes.

J Planning and Learning

J1 A planning process is in place that addresses short-, medium- and long-term planning concerns and issues.

J2 This process is an effective learning tool that helps the organization adapt to or effect change within its working conditions or environment.

J3 The process defines the quantitative and qualitative indicators that allow the organization to evaluate its progress and learning.

IV – RESOURCE DEVELOPMENT: RELATIONSHIP TO AUDIENCES AND CONTRIBUTED INCOME

K Relationship to Audience – Earned Income

K1 There is clarity with regard to whom the organization wants to connect and why.

K2 There is the same commitment to quality relationships internally extended to relationships with the audience.

K3 A commitment and process are in place to build and maintain audience relationships for both the short and long term.

K4 There are clear and coherent concepts, plans and approaches for generating and growing earned income that are appropriate to the work, community environment, organizational values and internal capacities.

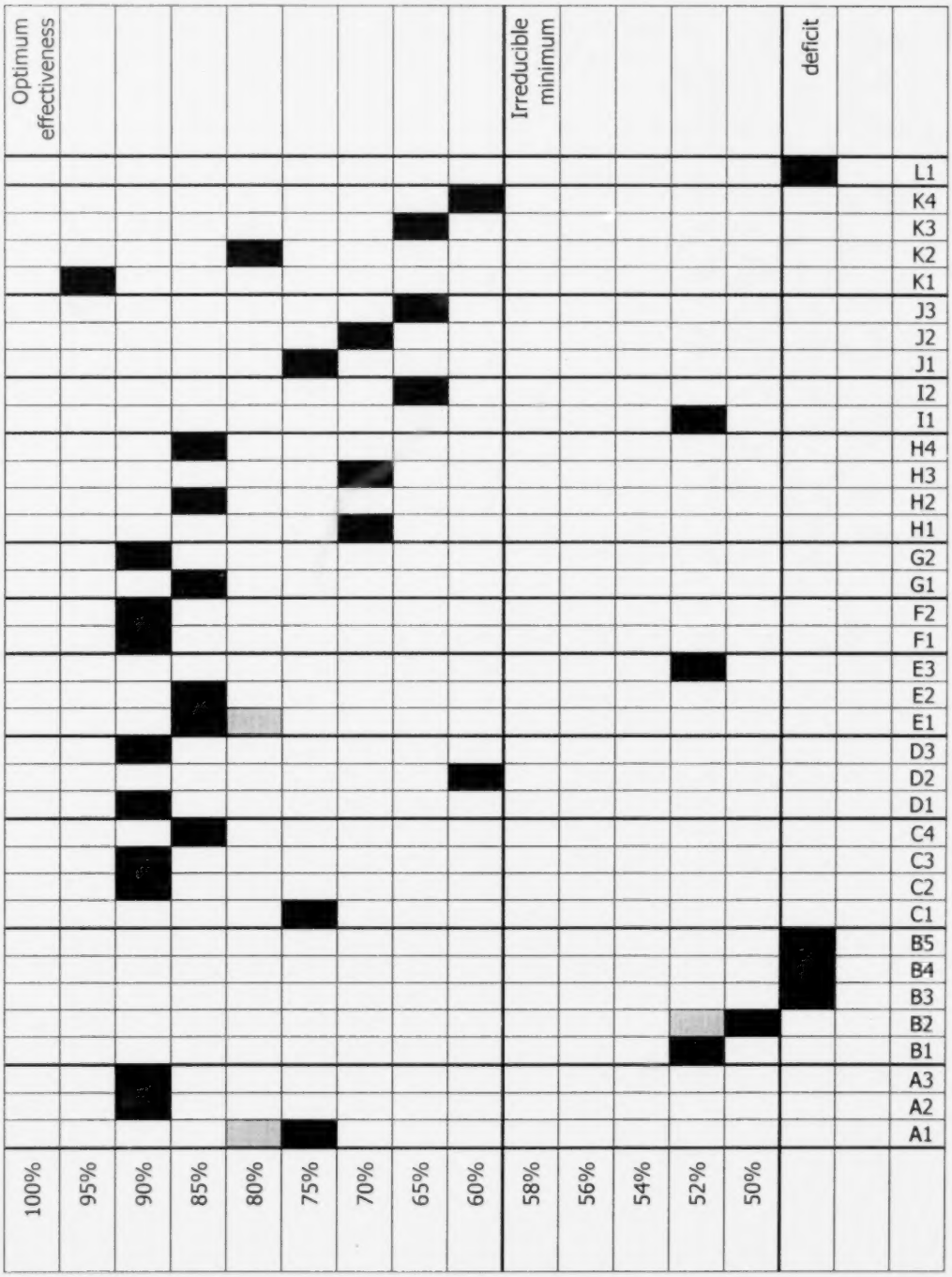
L Contributed Income

L1 There are clear and coherent concepts, plans and approaches for generating and growing contributed income that are appropriate to the work, community environment, organizational values and internal capacities.

Sample Self-Assessment Rating:

NAME OF ORGANIZATION

EVALUATION BASELINE AS AT: _____



SCORES			
Professional Leadership	A1	80	75
	A2	90	90
	A3	90	90
Board Leadership	B1	55	55
	B2	55	50
	B3	49	49
	B4	49	49
	B5	49	49
Vision/Mission/Values	C1	75	75
	C2	90	90
	C3	90	90
	C4	85	85
Internal Relationships	D1	90	90
	D2	60	60
	D3	90	90
External Relationships	E1	80	85
	E2	85	85
	E3	55	55
Working Format	F1	90	90
	F2	90	90
Organizational Equation	G1	85	85
	G2	90	90
Infrastructure	H1	70	70
	H2	85	85
	H3	65	65
	H4	85	85
Working Processes	I1	55	55
	I2	65	65
Planning and Learning	J1	75	75
	J2	70	70
	J3	65	65
Relationship to Audience	K1	95	95
Earned Income	K2	80	80
	K3	65	65
	K4	60	60
Contributed Income	L1	49	49

3 – Organizational Self-Assessment Checklist

http://www.nea.gov/resources/Lessons/WARSHAWSKI.HTML
by Morrie Warshawski, Editor

ORGANIZATIONAL SELF-ASSESSMENT CHECKLIST	Strong	Ade-quate	Weak	N/A
ORGANIZATIONAL PURPOSE				
1. Concise, written Mission Statement				
2. Concise, written Artistic Philosophy Statement				
3. Understanding of mission and philosophy by Board				
4. Understanding of mission and philosophy by staff				
5. Understanding of mission and philosophy by constituencies/general public				
6. Understanding of mission and philosophy by prospective funders				
7. Mission statement and philosophy reviewed regularly				
8. Concise, written history of the organization				
PROGRAMS				
1. Sense of vision and continuity provided by artistic leadership				
2. Annual program planning process				
3. Written annual program plan				
4. Formal communication of annual program plans to staff				
5. Formal communication of annual program plans to Board/volunteers				
6. Method for review/evaluation of prior year's program				
7. Method for determining whether programs meet constituent needs				
8. Written multiyear program plan				
9. Adequacy of rehearsal/preparation time/equipment				
10. System for costing out program elements				
11. Volunteer support of programs				
12. Other artistic issues				
GOVERNANCE				
1. Understanding of the responsibilities of the Board				
2. Written Board member job descriptions				
3. By-laws: current, functional, used				
4. Procedures for evaluating short-term/long-term objectives				
5. Procedures for recruiting new Board members				

6. Procedures for orientation of new Board members				
7. Procedure for evaluating Board members and/or Board rotation				
8. Structure of Board committees				
9. Frequency of Board meetings				
10. Attendance at Board meetings				
11. Procedure for meeting notice and preparation				
12. Effective use of time at Board meetings				
13. Board attendance at performances/exhibits				
14. Staff input into Board decision making				
15. Understandable financial reports presented to Board				
16. Board's understanding of finances				
17. Method of reviewing auditor's report				
18. Board represents community served				
19. Board's understanding of Board/staff relationships				
20. Board's understanding of fundraising				
21. Board members make sufficient cash donations annually				
22. Board members give time/expertise				
23. Board members advocate the organization in the community				
24. Board members review/approve long-range plan				
25. Board members' recruitment of new audience members				
26. Board members' recruitment of new donors				
27. Board members' sense of involvement				
28. Board members' sense of accomplishment				
29. Role of advisory committees				
30. Other governance issues				
STAFF				
1. Clarity of reporting relationships				
2. Current and accurate written job descriptions				
3. Administrative leadership				
4. Communication among staff members				
5. Communication between staff and Board				
6. Communication among staff, Board and artists				
7. Staff's understanding of the function and duties of the Board				
8. Staff participation in planning				
9. Appropriateness of staff size re: programming challenge				
10. Staff experience in relationship to the job assignment				

11. Time available to perform jobs satisfactorily				
12. Opportunities for staff training and personal development				
13. Systems for recruiting/using/thanking staff & and volunteers				
14. Written personnel manual and policies				
15. System for annual performance reviews				
16. Benefit package for staff				
17. Benefit package for artists				
18. Salary scale for staff				
19. Pay scale for artists				
20. Employment status of artists (employee or independent contractor)				
21. Staff use of consultants/contractors				
22. Staff morale				
23. Office equipment				
24. Other personnel issues				
MARKETING				
1. Understanding of who currently patronizes organization (e.g., ticket sales, book sales, memberships, etc.)				
2. Understanding of whom organization wants as patrons (target markets)				
3. Understanding of competition and annual review of their activities				
4. Tracking of actual ticket sales/attendance by event and fiscal year				
5. Mechanism for regular market research and analysis				
6. Annual written: marketing plan, subscription promotion plan, single ticket/membership promotion plan, other sales promotion plan				
7. Organization's subscription renewal rate (repeat customers)				
8. Effective marketing/promotional materials				
9. Marketing budget				
10. Analysis of cost-per-unit to sell each product				
11. Size of marketing staff in relation to task				
12. Experience of marketing staff in relation to task				
13. Staff use of marketing consultants				
14. Volunteer assistance with marketing/subscription/sales				
15. Ability of organization to accurately project earned income goals				
16. Ability of organization to consistently meet earned income goals				

17. Process for evaluating effectiveness of marketing plan				
18. In-house mailing list: computerized procedures for updating/purging information				
19. Other marketing issues				
PUBLIC/COMMUNITY RELATIONS				
1. Consistency and clarity of organizational image communicated to public				
2. Mechanism for handling of public queries, complaints, etc.				
3. Annual public relations plan				
4. Effectiveness in representing the organization: to its constituencies; to the general public; to the press; to critics				
5. Mechanisms for receiving and evaluating feedback from various sources				
6. Organization's publications				
7. Size of staff in relation to task				
8. Experience of staff in relation to job assignment				
9. Budget for public relations				
10. Understanding of difference between marketing and public relations				
11. Other public/community relations issues				
FUNDRAISING				
1. Process for setting annual fundraising goals				
2. Mechanism for providing development staff input into fundraising goals				
3. Mechanism for providing Board input into fundraising goals				
4. Ability of organization to consistently meet fundraising goals				
5. Written development plan for annual operating support				
6. Plan indicates secured, renewable and speculative contributed income				
7. Size of development staff in relation to task				
8. Experience of staff in relation to job assignment				
9. Grant writing expertise				
10. Individual donor research capacity				
11. Corporate, foundation, govt. grants research capacity				
12. Special events consistently net at least 50% of income as profit				
13. Impact on organization of producing special events				
14. Leadership of Board in special events				
15. Involvement of Board in prospect identification				
16. Involvement of Board in individual donor solicitation				
17. Non-Board volunteer support of fundraising effort				

18. Solicitor training				
19. Earned income/contributed income mix				
20. Organization's ability to attract individual donations; gifts; corporate and corporate foundation gifts; private foundation funding				
21. Level of local government grants (arts and non-arts)				
22. Level of provincial/state government funding				
23. Level of national government funding				
24. Development materials				
25. Computer support for fundraising				
26. Gift recording system				
27. Gift acknowledgement system				
28. Systematized information about donors/prospects				
29. Mechanism for systematic renewal of past/lapsed donors				
30. Systematic plan for expanding donor base				
31. Budget for fundraising expenses				
32. Other fundraising issues				
FINANCIAL MANAGEMENT				
1. Annual budgeting process				
2. Computerized accounting/budgeting/reporting systems				
3. Board mechanism for reviewing monthly statements				
4. System for regular cash-flow projections and monitoring				
5. Ability of organization to manage cash flow				
6. Formalized cost controls				
7. Ability of organization to pay accounts payable within 30 days				
8. Annual financial audit (with management letter) by CPA				
9. Board system for reviewing audit				
10. System of internal controls				
11. Payroll tax deposits made when due				
12. Ability of organization to manage debt repayment of notes/loans outstanding				
13. Line of credit for the organization				
14. Investment and endowment returns				
15. Formal policy that maintains integrity of cash reserve or endowment				
16. System for segregating pre-payments in restricted accounts				
17. Size of staff in relation to tasks				
18. Experience of staff in relation to job assignments				
19. Staff's understanding of financial systems				

20. Other financial management issues				
FACILITIES				
1. Space for productions/exhibits/activities at present level				
2. Space for expanded productions/exhibits/activities				
3. Space for current administrative staff				
4. Space for expanded administrative staff				
5. Space for current production staff				
6. Space for expanded production staff				
7. Storage facilities				
8. Image facility communicates to constituents				
9. Ambience of space for staff and volunteers				
10. Degree of organization's control of facility				
11. Length of lease agreement				
12. Other facilities issues				
PLANNING				
1. Multi-year plan in place and in use				
2. Plan reviewed and updated annually with Board and staff				
3. Evaluation of previous year's activities in relation to plan				
4. Other planning issues				
COMMUNICATION/DECISION MAKING				
1. Communication within the organization is open, candid, timely				
2. Decision-making process is well-informed, timely				
3. Other communication/decision-making issues				
EXTERNAL ENVIRONMENT				
1. Understanding of local/regional economic climate; giving to the arts; attendance of the arts				
2. Organization's knowledge of/relationship to arts community				
3. Organization's knowledge of/relationship to non-arts community				

The session participants were asked to work in groups to discuss how their values, culture and vision might influence them to develop a model of self-assessment.

Group A – Values:

- Reflect community you represent.
- Listening and acting as a conduit.
- Communication.
- Respect for culture, cultural beliefs and history.
- Easy relationship with laughter.
- Active listening.

Group B:

- Ensuring reaching target group.
- Reflected in staff, volunteers etc.
- Amateur to professional.
- How to move along continuum.
- What is holding organization back?
- Board – decision-making process – consensus.

Group C – What else to do:

- Vision for seven generations.
- Intergeneration/inclusive.
- Preservation of history.
    a. Where it came from
    b. Continuum
- Sense of community – here and where we came from.
- Storytelling.
- Mentorship – developing new ways and history of own culture continuing.

Group D:

- Models are a springboard for a bigger conversation.
- Artistic vision has to be at the centre.
- Analysis of evaluation is a snapshot in time.

Subject Breakout Sessions – Monday, February 7, 2005

C1 – The Value of Mentorship – led by Deborah Andrews

A Case Study of the Canadian Film and Television Production Association.

CFTPA

Representing television, film and interactive production in Canada

ACPFT

Porte-parole de l'industrie de la production télévisuelle, cinématographique et interactive au Canada

Canadian Film and Television Production Association

~

Mentorship Program

CFTPA:

- Represents approximately 400 producers
- Diverse membership
- Members produce for television, film, and interactive media
- 26-member Board of Directors representing each region
- 3 offices – Ottawa, Toronto, Vancouver
- Works closely with APFTQ in Quebec

CFTPA:

- Role of the association:
  - Represents general interests of members provincially, federally and internationally
  - MENTORSHIP PROGRAM
  - Negotiates and manages labour agreements
  - Creates international marketing initiatives
  - Oversees copyright initiatives
  - Publications, conference and Web site

Highlights

- Total production activity $4.92 billion:
  - $1.90 billion **in foreign location production**
  - $1.72 billion **in CAVCO-certified production**
  - $1.04 million **in broadcaster in-house production**
  - $258 million **in non-CAVCO certified production**
- 134 700 total full-time jobs

Co-production Treaties

- Canada has treaties with 54 countries
- Treaties enable Canadian and foreign producers to co-produce projects that enjoy the status of national productions in both countries
- Requirements for co-production with Canada
  - Canadian co-producer
  - usually minimum 20% financial participation
  - proportionate investments/costs incurred in each country
  - balanced financial, technical, artistic contribution
  - Approval by authorities in both countries
- Treaties are administered by Telefilm Canada and the corresponding authority in the other country

MENTORSHIP

- International Program
- National Program
- Aboriginal Program
- CTV Program
- Global Program
- Corus Entertainment Filmmaker Program
- Telefilm Producer Trainee Prgram

- Over 450 participants have been trained with a post-mentorship employment rate of over 80%

International Program

- Funded through Foreign Affairs Canada and International Trade (FAC)
- Opportunities for young people to develop skills in international marketing and distribution, co-productions
- Over 85% of our intern graduates secure employment in the industry
- Requirements – 18-30 years of age
    - post-secondary education
    - first international career-related experience
- Most participants work out of the country for six months

National Program

- Funded through HRSDC Youth Employment Strategy Career Focus Program
- Over 230 placements since the onset of the program
- Participants placed throughout Canada
- Requirements – 18-30
    - post-secondary education
    - unemployed or underemployed
- Intended to be the nexus between post-secondary education and career

Aboriginal Program

- Development of specific mentorship program for First Nations Peoples
- APTN, National Aboriginal Achievement Foundation, and many Aboriginal organizations across the country
- Complicated funding formula, multi-funders for one participant
- One of the most rewarding programs
- No age parameters

CTV Program

- Funded by CTV as part of their social benefits package
- Intended to be for projects that are cross-platform, new media in nature
- Generally a professional development program
- Places up to six in the country annually

Global Program

- Funded by BC Global
- Funded as part of a social benefits package
- Five-year commitment from the private funder
- Places up to six participants annually in BC
- No age parameters

Corus Young Filmmakers Program

- Funded by Corus Entertainment
- Five-year commitment
- Funds up to six short films a year
- Participants are guaranteed a national broadcast window
- Takes mentoring one step further than other programs

Training vs. Mentoring

- What is training
- What is mentoring
- The difference?
- Matching
- Monitoring
- Evaluating
- Follow up
- Tracking

Training

- Can't move up, get boxed in – this program moves to middle level.
- No age parameter.
- Youth program is not transit supportive of cultural-sector lifestyle.

Mentorship

- Allows you to know if something has gone wrong.
- Passion of sharing knowledge; checks and balance to keep relationship strong.
- National mentorship strategy is formulized mentorship.
- Sympathetic role model, colleague – that impart their knowledge.
- Will deliver: complete deadline – mentor creates path so learner can get there.
- Reward – moving people forward.

Positions training and mentor

- Who does funding go to? Most organizations are strapped. Where are we going to find sources in an already flat source base?
- 50 to 80% WAGE subsidy.
- Paid employment – T4 system.
- Training – 20 to 39 weeks and if can identify more can usually get money from EI Programs.
- Competitive for mentor and participant.
- Application on Web site for ideas.

Mentorship program

- Entire placement is on-the-job training.
- Application should include outline of schedule, achievable goals of participant, future opportunities of participant, timed training, relationship, work styles of mentor.
- CFTPA checks in once a month, participant to e-mail once a week.
- Contractual agreement.
- Will assist with mentorship delivery if necessary – intervene with personality if necessary.

The following are comments from the Q&A session regarding the administration of a mentorship program:

- Look for sympathetic role models as your mentors.
- Consider personalities.
- Ask participants to do some research.
- Have participants identify areas that they would like to focus on then connect them to the right mentor.
- LISTENING is key.
- Meet with participants and mentors as much as possible.
- Know the mentor will take time to work with participant.
- Mentorship is all about relationship building.
- Seasoned veterans are often more interested in career-oriented candidates; not as interested in academic stream.
- Make sure there is a benefit to the mentor; always a need to find a way to compensate them; mentors will burn out.
- Monitor progress and ensure there are logical steps to mentorship.
- Give participants and mentors opportunity to make comments off the record.
- Bring mentors together regionally.

Remember: not all internships are created equal.

C2 – Surviving Transitions – led by Lisa Steele

A working session to explore and suggest ways of building and sustaining healthy organizations that can adapt and survive transitions.

Group Brainstorming session: Identifying "transitions" in our organizations

Examples of small or minor events triggering transitions:

- Turnover of junior staff.
- Ordinary turnover of Board members.
- Small (less than 10%) decrease in operations funding from regular source.
- Perceived change in audience.
- Incremental technological change.
- Small but unforeseen expenses.

Examples of major events triggering transitions:

- Senior staff turnover.
- Board-in-revolt (a serious dispute between staff and Board; or a split within different factions of the Board).
- Volunteer committees in revolt or seriously out of sorts with management and/or Board.
- Significant (more than 10%) decrease in operations from regular source.
- Large unforeseen expense.
- Rapid growth.
- Expansion of artistic mandate.
- Expansion of venue.
- Relocation.

Examples of catastrophic events triggering transitions:

- Significant government intervention (police investigation and/or charges) or direct intervention in the form of censorship of exhibition/activity, etc.
- Transformation of major funding sources.
- Serious theft or flood, fire, weather damage to the physical premises and/or collection.
- Split of the organization.
- Incurring deficit.

Break-out groups: Each group was asked to develop strategies to address these situations:

Group A: Your arts centre/organization has to replace a chief executive officer who leaves suddenly because of illness; one week's notice.

Staff Perspective:

- Suggest a three-month contract to the departing staff.

- Will the person be returning?
- Make special allowance for disabilities.
- Is there a succession plan?
- Is there a search committee developed by Board?
- Could a Board member take on a leadership role?
- Could the staff member come in one day a week and provide guidance and help with the transition?
- How is the additional work load divided up?
- Look at it as a positive opportunity.
- Redefine job descriptions (maybe they are outdated).
- Important to share information between Board and staff to ensure constant flow of information.

Board Perspective:
- Sympathetic/fair approach.
- Negotiate the exit transition for the outgoing person.
- Look at four possible options:
    a. Existing Board member
    b. Existing staff member
    c. Previous Board member
    d. Previous staff member
- Identify immediate key tasks and deadlines.
- Create a critical path for the next year or six months with outgoing person or new CEO.
- Allocate decent amount of time for search process.
- Possibility of involving staff in search process.
- Hiring committee to include membership/stakeholders/volunteers familiar with the organization.
- Consider the details in light of the exiting staff.
- Public relations strategy to communicate to public.

Worst-case scenario:
- Other staff quit.
- Lack of plan.
- Other Board members quit.
- No communication.
- Split (the Board doesn't think there is a possible candidate and staff thinks there is).

Group B: Your arts centre/organization faces a 25% decrease in operations funding from your main operations funding body as a result of government cutbacks.

Staff & Board Perspectives (Staff and Board decide that they should work together)

- Communication transparency.
- Internal committee with Board and staff to figure out what and why it happened.
- Internally go through consultation process.
- Share info and past experiences and knowledge.
- Identify other strategies.
- Reaching an agreement between Board and staff.
- Public relations – putting "best face forward".
- How much deficit is the Board willing to incur?
- Honest look at what/how organization can survive on.
- What cost savings and efficiencies can be found?
- Look for alternative funding.
- Advocacy:
    a. City councillors and funders.
    b. Engage the public and encourage them to support you through advocacy on your behalf.
    c. Bring in other affected organizations.
    d. Partnership with other organizations.
    e. Contact other membership organizations.
- Look at as an opportunity to raise public profile for positive change.
- Committee made of staff/Board/volunteers/community members/stakeholders to solve the problem.
- Revise strategic planning.
- Identify Board expectations from staff.
- Bringing two parts together.
- Identify long- and short-term cuts and their affect on the organization.
- Construct a time line.
- Get a consultant to analyze the situation.

Group C: Your arts centre/organization is visited by the local police and the possibility of being charged with violating "morality" or "obscenity" or "pornography" laws is suggested.

Board & Staff Perspectives (Team)

- Establish Board-approved procedure ahead of time for the front-line staff.
- Internal communication to front-line staff is essential.
- One spokesperson should be assigned ahead of time to speak to police or media (not from the front-line staff, preferably a more experienced staff member).
- Staff should be cautioned not to speak to police or media; only the spokesperson should do this.
- Inform the Board of the possibilities of controversies ahead of time.
- Emergency meeting of an organization to handle the situation (Board and staff).

- Post-crisis management:
    a. Bring in a facilitator.
    b. Avoid finger-pointing.
    c. Establish an action plan that both feel comfortable with.
- Available resources to staff.
- Lower expectations on staff during crisis.
- Re-examine organization's mandate in a positive manner.
- Strengthen the mandate (facilitator can help the process).
- Make sure Board and staff are behind the mandate and that they are comfortable.
- Two-year commitment.
- Have someone with legal expertise on the Board.
- Ensure physical safety of staff and facility.

Group D: The Board of Directors of your arts centre/organization is in serious conflict with the staff, threatening to redefine all positions and make everybody re-apply for their jobs.

Board & Staff Perspectives (Team)

- Prevention is key.
- Shared vision.
- Strategic plan and Board manual are essential.
- Use a mediator to facilitate discussions.
- Communications strategy for media/public and to answer questions.
- Communicate the problem.
- Cooperation.
- Establish trust between Board and staff.
- Define roles and responsibilities of Board.
- Discuss Board rotation.
- Acknowledge emotional impact on staff.
- Staff investigate the legal issues.
- Reach an ultimate resolution.

C3 – Occupational Health and Safety – led by Janet Sellery

A workshop to explore the benefits of implementing an OH&S policy.

Ontario's health and safety system

ENFORCEMENT	PREVENTION
Ministry of Labour - orders - tickets - charges - fines - jail time WSIB – Workwell Audit - fines - surcharges	WSIB – Prevention - Account Manager, Customer Service Rep - Prevention Division Safe Work Associations - Ontario Service Safety Alliance (OSSA) - Education Safety Association of Onario (ESAO) - Construction Safety Association of Ontario (CSAO) - Industrial Accident Prevention Association (IAPA) - Occupational Health Clinics for Ontario Workers (OHCOW) - Canadian Centre for Occupational Health & Safety (CCOHC)

Challenges – These affect *every* hazard in the arts:

- Diversity of staff.
- Each project is unique.
- Atmosphere of continuous creativity and change.
- Creative risks vs. safety risk – "The show must go on."
- Situations where many variables change at once.
- Time pressure – hard deadlines.
- Limited control of workload and schedule leads to fatigue and stress.
- Wide variety of training and experience.
- Highly mobile, seasonal workforce.
- Young worker/ aging worker issues.
- Health and safety will destroy art: "We're special, we're different, we're not a factory."

First Steps for Developing a Health & Safety Policy and Program

- What have you got?
- What do you need?
- Where do you start?
- Criteria:
    i. Urgent – controls for serious and immediate hazards
    ii. Easy – top five
        1. Health & Safety Policy.
        2. Health & Safety Notice Board.
        3. First Aid Kits and Training.

4. WHMIS (Workplace Hazardous Materials Information System).
5. Joint Health & Safety Committee or Health & Safety Representative.

Approach: Respect, Respond, Require.

PUBLICATIONS

- **The Health & Safety Guide for Film, TV & Theater** by Monona Rossol, Allworth Press, New York, 2000.
- **The Artist's Complete Health and Safety Guide** by Monona Rossol, Allworth Press, New York, 2nd edition, 1994.
- **Construction Health & Safety Manual**, Construction Safety Association of Ontario, 2004 Edition. An excellent technical training tool in health and safety – legal responsibilities, WHMIS, basic occupational health, equipment, hazards, and best practices for a variety of tools. Recommended for all theatre shops.

INTERNET RESOURCES

- **Arts, Crafts and Theater Safety (ACTS)** www.artscraftstheatersafety.org. Based in New York State, this organization provides free theatre health and safety brochures, pamphlets, and advice. They also have a newsletter, and the organization's president is arts-safety expert Monona Rossol.
- **Canadian Actors' Equity Association (CAEA)** www.caea.com. The stage management section of this Web site includes a General Health and Safety Checklist for use by stage managers and a link to Safety Guidelines for the Live Performance Industry in Ontario published by the Ontario Ministry of Labour in 1997.
- **Canadian Institute for Theatre Technology (CITT)** www.citt.org. CITT publishes "Theatre Safety Basics", a guide to creating a safety program for your company. CITT's Web site offers an online archive of their publication "StageWorks," which offers up-to-date news on health and safety issues and commentary. There is also contact information online for regional representatives who plan and oversee regional workshops.
- **Safety Guidelines for the Live Performance Industry in Ontario** http://www.gov.on.ca/LAB/english/hs/guidelines/liveperformance.
- **"To Act in Safety" a Theatre Ontario initiative**, www.theatresafety.ca. Best practices and resources for theatres.
- **Film and Television Health & Safety Committee** www.filmsafety.ca. Health and safety guidelines for film and television.
- **SHAPE (Safety & Health in Arts, Production & Entertainment)**, British Columbia, Workers Compensation www.shape.bc.ca.
- **Prevention Dynamics** www.preventiondynamics. A health and safety portal to find information, training materials and consulting services offered by Ontario's health and safety associations and partners.

- **Ontario Ministry of Labour** (MoL) http://www.gov.on.ca/LAB/english/about/leg/hs_leg.html. Legislation (Occupational Health and Safety Act ,Workplace Safety and Insurance Act, 1997 and Regulations) as well as guides to health and safety legislation (A Guide to the Occupational Health and Safety Act, A Guide for Joint Health and Safety Committees and Representatives in the Workplace, Workplace Hazardous Materials Information System (WHMIS): A Guide to the Legislation).
  NOTE: For a complete reference to the regulations made under the Occupational Health and Safety Act, please see the Annual Consolidated Index to the Regulations of Ontario: Titles of Regulations on e-Laws (www.e-laws.gov.on.ca).
- **Ontario Service Safety Alliance (OSSA)** www.ossa.com. Safe work association for services industries, including entertainment (live performance, film and TV).
- **Education Safety Association of Ontario (ESAO)** www.esao.on.ca. Safe work association for art centres, museums, schools, colleges, universities and libraries.
- **Workplace Safety & Insurance Board (WSIB)** www.wsib.on.ca. Prevention and no-fault workplace insurance, financed by employer premiums.
- **Occupational Health Clinics for Ontario Workers (OHCOW)** www.ohcow.on.ca. Primary focus: ergonomics, industrial hygiene, occupational disease.
- **Canadian Centre for Occupational Health & Safety** www.ccohs.ca. Information sheets under OSH Answers as well as an Inquiry Service.

The following are excerpts from Janet's conversation with session participants:

- "I wish that a session like this had been available when I was starting out. I found the task of starting our health and safety program overwhelming initially."
- "The creative process presents many health and safety challenges; however, there are also opportunities for customized solutions because we can't always open a supplier's catalogue to find an instant answer."

Why should you get involved with health and safety?

- "You are all busy and resources are stretched, so why would you take this on? It could be because you need to comply with legislation – you are concerned about Ministry of Labour orders, charges, fines and jail time, and now, under Bill C-45, the possibility of criminal charges. You may also be concerned about costs from fines, lawsuits, worker's compensation or Workwell."
- "In my opinion, the most compelling reason for the arts community to focus on health and safety is because we have something very special to protect."

- "When I began to create our program, initially, I met with some resistance. Some people said that all of this health and safety would destroy art. 'We're special, we're different, we're not a factory.' I agree, we are not a factory but it is not acceptable to me that our artists, our craftspeople and our support staff should be any less protected than a factory worker."
- "You are the experts in your discipline....you know best if something will work. If not, use your creativity to find a better way. The arts community requires creativity in all its activities.... Health and safety is no different. Find resources, support and encouragement wherever you can."
- "When you contact a prevention organization, they cannot report you to an enforcement organization. These are separate approaches, so don't let the lack of a formalized program stop you from getting the assistance you need."
- "Once you know what policies you have in place, you need to figure out what legislation applies to you, this might include The Occupational Health & Safety Act, the Workplace Safety & Insurance Act, the Industrial Regulations, the Construction Regulations, the WHMIS Regulations, the First Aid Regulation and the Safety Guidelines for Live Performance. All provincial legislation is available online."
- "It is important to know that the law requires all employers to exercise due diligence. This means 'take every precaution reasonable in the circumstances for the protection of the worker.' That's a pretty high standard. In order to take precautions, you need to know what hazards exist."
- "You might want to consider arranging for a consultant from a safe-work association to assist you with your assessment."
- "Regardless of the size of your company, you will need some written policies and procedures. Most important is your Health & Safety Policy, a one-page statement that will give the framework for your program. This is a written statement of the employer's commitment to protect the health and safety of employees at work."
- "Depending on the size of your company, you will need to establish a Joint Health & Safety Committee or have the workers select a Health & Safety Representative. The Ministry of Labour has a guide that describes how to do this and it can be downloaded from their Web site."
- "**Respect** the incredible diversity of our artists and the unique nature of each project."
- "**Respond** to questions and requests as quickly as possible."
- "**Require** your staff to comply with legislation, wear personal protective equipment and report hazards, injuries and incidents."
- This is fairly new within the arts community but we must work together in the belief that workplace injuries and illnesses are unacceptable.

C4 – Dealing with Challenge and Conflict – led by Clark Reed

A workshop to develop strategies regarding dealing with challenge and conflict.

What does conflict mean to cultural workers?

- Conflict is usually viewed as a bad thing, to be avoided; should "keep the peace."
- Conflict, if managed properly, can enrich; or if handled badly, can destroy relationships.

Model for Dealing with Challenge and Conflict: Tips and Techniques

- The cultural sector has lots of areas of conflicts:
    a. Demands for resources.
    b. Overwork.
    c. Tensions between artistic/administrative sides.
- Conflict offers opportunity: to innovate and to create more productive environments.
- Need to look at how you manage conflict: What is the cultural manager's point of view?
    a. Conflict with peers, staff, Board, patrons.
    b. Wants to mediate, to help others.
- We all have a style, a dominant style that we keep going back to, but it may be inappropriate.

- **Five Styles for Dealing with Challenge and Conflict**
    1. Accommodate: to put your own desires on backburner, other person's needs are met.
    2. Avoid: avoidance of the other person.
    3. Compromise: quick solution, both sides win, both sides lose
    4. Compete: I win, you lose, no one gives an inch.
    5. Collaborate: explore the problem, then explore options, style that gives best long-term outcome.
- Is there one you naturally default to?
- Q: What percentage of people would you say whose dominant style is collaboration?
  A: Statistically 45%.
- Q: Do you think we should use collaboration all the time?
  A: Need to be aware of the styles and choose when they are appropriate.

Session leader presentation is in borders, recorder notes are noted as addendum:

Re-Generation: The Healthy Arts Leader
Dealing with Challenge and Conflict

Accommodate

- You put aside your own needs and wishes
- You place a high value on the relationship, low value on outcome
- Also appropriate when other person values outcome much more than you

Tips:

- *Don't be too quick to use this style*
- *Make it a proactive decision*
- *Be seen as cooperative, not weak*

ADDENDUM NOTES

- Make it clear to the other person that you gave something up; this is a potential bargaining chip for the future.

Avoid

- You side-step or withdraw from the conflict situation
- Neither the relationship nor outcome is very important to you

Tips:

- *Prevents anyone from resolving the conflict*
- *BUT – sometimes conflicts can resolve themselves when left alone*
- *Appropriate when you're unprepared*
- *Appropriate when there is danger or threat*

ADDENDUM NOTES

- Useful in a situation where the conflict will blow over.
- Saving your power for another time.
- Be cautious: when staff witnesses this approach, it might indicate you lack authority.
- Long-term avoidance is not appropriate.
- Useful when feelings are running high.

Compromise

- You both look for a fair split between your positions
- You place a somewhat higher value on the relationship than the outcome

Tips:

- *Flexibility is key*
- *Needs a degree of trust, openness and mutual understanding*
- *Appropriate when you want quick closure*

ADDENDUM NOTES

- Clarity of the facts is necessary; honesty will lead to a solution.

Compete

- You win at the expense of the other person losing
- You place a high value on the outcome, low on relationship

Tips:

- *Not necessarily negative – has appropriate uses*
- *Appropriate when quick decision is crucial, or outcome is extremely important*
- *There's only one winner*

ADDENDUM NOTES

- I win: you lose.

Q: In what type of situation do you compete?
A: When you think you are right.

Collaborate

- You cooperate to find a mutually satisfying outcome
- You place a high value on both the relationship and outcome

Tips:

- *Requires trust*
- *Needs high-level communication and problem-solving skills*
- *Candidness and an open mind are key*
- *Share information, not potential concessions*
- *Can create false expectations*
- *Can take considerable time and energy*

ADDENDUM NOTES

- Applicable when goal is long-term satisfaction.
- Hard to achieve with non-participative person.
- Make sure points are clearly articulated.

Should we *always* collaborate?

No.

Use it when:

- Both parties will cooperate and participate
- End result is *very* important to both parties
- Your goal is long-term satisfaction and effective relationships

Avoid it when:

- You need a quick decision
- You need to take responsibility for a management course of action

Making collaboration work

- Share information openly
- Encourage the other person to share needs and wants
- Explore multiple options
- Postpone discussion if feelings are running high
- Stick to collaborating before discussing solutions in depth
- Be creative in looking at the problem

A "model" for collaboration

- Spend time discussing the problem
  - Both perspectives
  - Anything overlooked, any exaggeration or confusion?
- Generate lots of possible options
  - Explore competing views – are there noncompetitive ways to solve the conflict? Three, five, ten alternatives? Be creative.
- Agree on the best option
  - Work hard at finding an "out" – a way that ends your conflict to everyone's advantage.

Choosing the best style

Ask yourself:

1) Is my relationship with him/her important, either for personal or business reasons?
2) Are we often in the same room because of common interests or activities?
3) Do I care what he/she thinks of me once we've resolved this conflict?
4) In the past, has my relationship with him/her involved a lot of communication?
5) Do I suspect that he/she has some hidden motives in this case?
6) Might the way we deal with this issue "set the scene" for handling future conflicts?
7) Is it worth spending a lot of time to resolve this conflict?
8) Will I feel badly if I don't get what I want in this situation?

Consider your answers...

- When neither the outcome nor relationship matters to you, an Avoid style will probably be most effective.
- When the outcome is not important but the relationship is, an Accommodate style will probably be most effective.
- When the outcome and relationship are both very important to you, a Compromise style will probably be most effective.
- When the outcome and relationship are both very important to you, a Collaborate style will probably be most effective.
- When the outcome is important but the relationship is not, a Compete style will probably be most effective.

Excellent communication skills ....
the key to successful conflict resolution

- Maintain a supportive, *not defensive*, atmosphere.
- Stay assertive, regardless of temptations to behave otherwise.
- Actively listen:
  - Use body language to show you are listening
  - Focus on clarifying
  - Paraphrase and summarize when appropriate
- Continually probe for more information.
- Be sensitive to nonverbal cues.

Conflict with a difficult person

- Be very clear with yourself about what behaviour bothers you.
- Face the behaviour in as non-threatening a way as possible.
- As always, be willing to listen attentively to the other person.
- Work on the conflict by trying to meet both your needs.
- Put the resolution into action.

ADDENDUM NOTES

- The other person might never change: decide what you can achieve and live with.
- Be prepared to part ways.

Some final tips...

- Separate individuals from problems.
- Be flexible about the other person's viewpoint or style of working.
- Accept that a different opinion or approach is simply different, not wrong.
- Don't attach negative labels to people.
- Continually focus on getting results rather than on your personal position.

The following are suggestions from the session:

- Regarding mirroring: you spend a lot of time listening to problems, not solutions; it might appear condescending, only use it when you really need clarification.
- Every situation will require a specific approach; be prepared to use any of the strategies presented.
- Regarding group collaboration:
    a. Share information openly.
    b. Encourage sharing of needs and desires.
    c. Explore multiple options – trying to find a non-competitive solution.
    d. Postpone discussions if feelings are running high.
    e. Discuss all perspectives, generating many options.
    f. Agree on the best option(s), satisfying all parties on some level(s).

C5 – Organizational Self-Evaluation – led by Michelle Harkness

A workshop offering methods of self-evaluation that identify organizational health and structure in order to define strengths and weaknesses and target areas for change.

For Organizational Self-Assessment Checklist see pages 50 to 55.

Session leader presentation is in borders, recorder notes are noted as addendum:

Organization Effectiveness and Evaluation
February 7, 2005
Michelle Harkness

Organization Effectiveness & Evaluation Agenda

Part A
- Organization Design Overview
- Why Organization Design Is a Powerful Tool
- Galbraith's Star Model

Part B
- Organization Effectiveness Overview
- Impact of Internal and External Factors
- Considerations for Measuring Effectiveness
- How to Evaluate Effectiveness

Part C
- Exercise in Organization Effectiveness and Evaluation

Organization Design Overview

- Organization Design – *implementing the structural configuration that will support the business strategy.*
- Organizations must be ***designed*** to be effective and efficient in achieving their purpose.

ADDENDUM NOTES
- Any group of individuals has set systems that bring people together to reach a common goal.
- Organizational priorities can be found in job descriptions, hierarchy, etc.

Organization Design

- Discipline aimed at improving performance and effectiveness.
- Organizations are not static – continuous interaction with external environment.
- CHANGE

ADDENDUM NOTES

- Changes in mission and vision can alter goals; must be in tune with environment when considering organizational change.
- Every organization has unique needs.

Organization Design

Warren Bennis suggested three factors underlying the emergence of OD.

1. Need for new organizational forms.
2. The focus on cultural change.
3. Increase in social awareness.

Jay Galbraith's introduction of the four Immutable Forces:

1. Buyer Power – designed around customers, e.g., Community
2. Variety – need to offer more products and services
3. Change – external factors, situational changes
4. Speed – faster response time, shorter lead times and cycle times

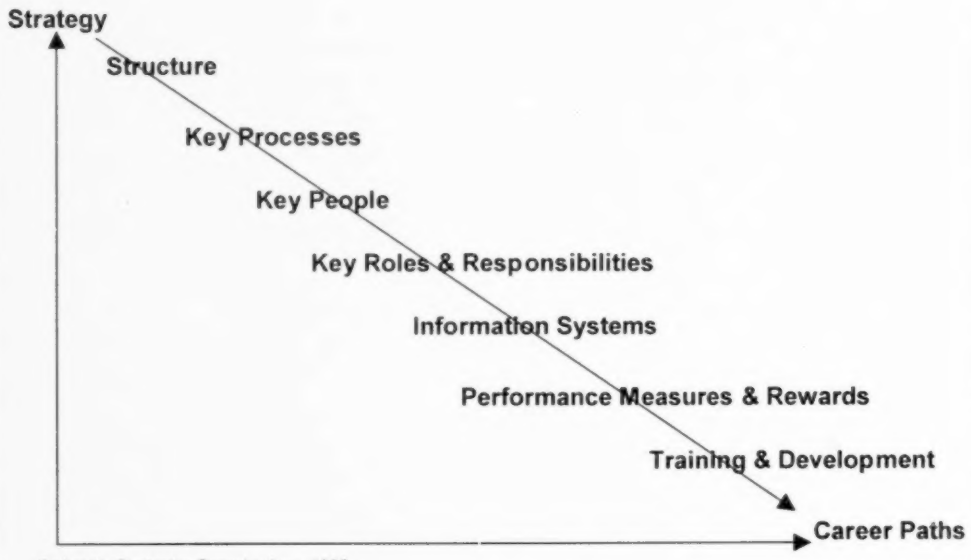
ADDENDUM NOTES – STAR MODEL

- Star Model can apply to all organizations.
- Ensures everyone is on the same page.
- Crucial to the identification of the team's focus, goals, and commitment.
- Every organization has its own unique structure.
- There are different structures within larger organizations, depending on the division's focus.
- Rewards – what is the motivation?
- People – recruiting an effective team.
- Any change made at the strategy level affects the other levels of the Star Model.
- Star Model is focused on "mission" and based on interconnectedness.

The Star Model

Star Model, Galbraith, Design Organizations, 1995

The Design Process



Galbraith, Designing Organizations, 1995

Why OD Is a Powerful Tool

Organization designs that facilitate variety, change, and speed are sources of competitive advantage.

The entire organization achieves the mission.

Design of your organization will impact culture, employee values, decision-making power, effectiveness.

Galbraith, Designing Organizations, 1995

All Encompassing Nature of OD

- Organization Culture
- Career and Succession Planning
- Change Management
- Communication Strategies
- Knowledge Management
- Creativity and Innovation Strategies
- Diversity
- Job Design
- Mergers and Acquisitions
- Organizational Effectiveness
- Performance Management Strategies
- Compensation and Reward Strategies

Organization Effectiveness Overview

- Deploying your organization's strategy can be much more difficult than designing it.
- How do you know if your organization is achieving its goals?

Measuring Effectiveness

Companies with performance management processes significantly outperform their competitors, regardless of size on key indicators such as industry leadership, financial ranking and capacity to make organizational or operational change.

Conference Board of Canada,
Using Measurement to Transform the Organization, 1996.

Measuring Effectiveness

- How do you determine effectiveness?
- How do you **MEASURE** effectiveness?

  - ☐ Feedback
  - ☐ Positive Reviews
  - ☐ Calibre of Artists
  - ☐ Number of Donors
  - ☐ Web Site Hits

Effectiveness Factors – External and Internal Influences

- Arts and Culture Industry – hard to set measures.
- Subjective external analysis of artistic success and community impact.
- Your organization needs to establish its own unique measures – linked to strategic plans.

Effectiveness – External Factors

- **Political** – funding, support of the arts, administration changes, structure of Board.
- **Economical** – jobless rates, ticket prices
- **Socially** – perception of organization during quiet and turbulent times *e.g., SARS, 9/11, Tsunami*
- **Technologically** – changes will impact effectiveness.

Effectiveness – Internal Factors

- *Is your Mission effectively meeting established goals?*
- *Are you effectively using human, financial, technological resources?*
- *Do core fundraising events continue to emphasize your core mission?*

Considerations for Measuring Effectiveness

- Performance measurement brings you to a concrete discussion about effectiveness.
- Public Sector Measures:

1. *Customer Service*
2. *Community Impact*
3. *Efficiency*

- Not recommending hundreds of measures, just specific measures that reveal success of the objectives.
- How effective is your organization at achieving its strategic objectives?
- How do you know when you have achieved your strategic objectives?

ADDENDUM NOTES

METHODS OF MEASUREMENT:

- Surveys.
- Company meetings.
- Statistics
- Calibre of artists.
- Number of donors.

As Measured By....

Take the big picture down to a functional, measurable objective.

What do you want to know????

1. What do you need to measure
2. What data will provide this information
3. What time frame is measure required in

Every time someone suggests a goal or measure you should ask...

As Measured By...

Programs:

- number of positive reviews... *As Measured by...*

Marketing :

- new patron acquisition... *As Measured by...*

Fundraising:

- organization meeting fundraising goals... *As Measured by...*

Governance:

- Board attendance – performances/exhibits...*As Measured by...*

ADDENDUM NOTES

- Selection of measurable criteria requires creativity.
- What do you want to know?
- How can you get the data?
- What is your timeline?

PRINCIPLES FOR ESTABLISHING MEASURES

- Root cause.
- Keep it simple.
- Key issues.
- Accountability.
- Avoid duplication.
- Feeds into performance improvement.
- Time frame.

Q: How do you improve the effectiveness of your organization?

A: Assess strengths and weaknesses and begin working on the weaknesses.

Every time someone suggests a goal or objective you should ask... ***As Measured by...***

D1 – Generational Diversity in the Arts – led by Jane Marsland and John Watson

A session to explore the differing needs, motivators and desires of different generations in our workplaces and audiences today.

Governing values of our world (Western)	Current Frame	New Paradigm
Win/don't lose	Self: I know the right answer	Self: I know a lot, but I don't know everything
Maintain control	Other individual: Is uninformed or ill-intentioned	Other individual: May know important things that I don't know
Avoid embarrassment		
Stay rational	Task: Get him/her to see things my way because I have the right answer	Task: How can we make the best choices together to achieve our goals? Possibility: we all have important point of view

To set the stage for a meaningful discussion, the room should be seen or conceived of as a container that holds conditions for possibility, safety and respect.

The concept of heroic mind set in the sector was discussed. Senior managers think they can solve all the problems by themselves and they become over-controlling and resistant to change.

Question asked by younger generation:

What are we doing that we can't accomplish our tasks at the given/certain time? (Objection and frustrations were expressed over the heroic mind set, unremunerated overwork, long hours, low pay because of the good of the arts, or because of the passion for the arts. Because the reality is that you become burned out and stressed and you lose your passion!)

- Redefinition of passion is necessary.
- What are the things that we deeply share with each other?
- What are the most critical values that draw us to the arts?

Values (shared by the participants), some they believe that exist, some should be built into:

- Being listened to.
- No assumption that age = experience.
- Ability to learn from others.
- Learning from peers.
- Respect.
- Using one's skills.
- Values of elders should be built into the organization (another way of listening culturally).
- Creating high-quality/transformative art.
- Money/time a sense of tension.
- Appreciation for work and effort.
- Challenge and achievement.
- Life-long learning.
- Value yourself and help correct others.
- Working and interacting with people you like.
- Having fun.
- Recognition and values of cultural diversity, recognition that not everybody comes from the same cultural background.
- Arts barometer of the society (how to continue my art, which is classic, to reflect the current society).
- Collaborations; sense of community.
- Mystery about work/experience; unpredictability of the work of art.
- Ability to live with the community.
- Having access to art.
- Balance and openness that speaks to the love of the art (core value).
- Meeting people in their own environment.
- Sharing of skills between generations.
- How should young generation keep things going (carving your own method)?
- Ability to make mistakes (lowering the pressure).
- Extraordinary trust.
- Learning from seniors.
- Knowledge support.
- Make a movement that makes a difference.
- Intergenerational staff to understand audience.

Q: How can we bridge the differing values between generations? Are these impossible barriers?

A: We can bridge the gap by building the culture of trust and respect.

D2 – Working in Crisis? – led by Teresa O'Neill

A session that considers strategies to change how we approach our work.

Teresa O'Neill described her approach to workshops and her work as a life coach and thanked those who turned up for a topic such as "Working in Crisis" at the very end of a packed conference. She stressed that it was all about perspective, and the group could use being at the end of a full schedule positively – especially as this session would be different. Her process is to take individuals through questions and explorations so that they can take something personal away for their own use. Each person will acquire something different.

As the questions were to be addressed by individuals from personal experience, Teresa stressed that the workshop was a safe place and that confidentiality was essential in order for the respect to be maintained. Therefore, the items captured in point form below are topics and recurring themes that were more general, as opposed to any specific contexts or situations.

What brought you here? This question resulted in some common threads of crisis points:

- Organization currently in crisis.
- Desire to avoid crisis.
- Increasing levels of crisis.
- Crisis implying that issues must be addressed.
- Crisis as a catalyst for positive change.
- Personal crisis.
- Functioning in a crisis.
- Organizational transition.
- Stress.

Teresa provided everyone with a crisis safety "kit" that can be used as a tool for exploring crisis states, and which she said could be employed to help take control over one's environment, circumstances, and perceptions and as a self-management tool to come up with strategies for handling crisis and change.

An exercise using a clothesline and "band-aid" and "heart" pegs was employed for an examination of crises. The band-aids were attached to stresses and hurts. The hearts were used by participants for those aspects of our selves and lives that were in need of re-affirmation, nurturing and strengthening. Participants were split up into pairs and shared personal stress stories from life and/or work environments; selected ones were then brought forward and discussed with the larger group and the facilitator. Then, a similar exercise was done with individual passions and visions, and a few of these were also shared with the whole room. Teresa was especially interested in identifying where these two sides might actually be linked, or conversely disconnected from each other.

Among the stresses and pains were these:

- Fear of failure.
- Lack of adequate information.
- Sense of being a "fraud" or being found not up to the task.
- Unreasonable timelines.
- Too much to do.
- Overload / exhaustion.
- Work / life balance issues.
- Career changes.
- Personal life changes and their effect on work.

Among the joys, visions and passions were these:

- Belief in the company and the art being produced.
- Organizational values in line with personal beliefs.
- Passion for the artists, performers and the art form itself.
- Satisfaction of achievement.
- The privilege of doing what one really loves.
- Multitude of opportunities.
- Reclaiming self.
- Connectedness to others.

Teresa concluded by discussing the importance of doing nothing when we are out of balance as a means of taking stock. Often working in crisis can be repositioned by something as simple as finding whatever achieves a reconnection with a place of value. She stressed the importance of stepping outside the immediate circumstances, seeing the bigger picture, and placing yourself (including your pains and passions) into that framework.

D3 – Cluster Management – led by Christine Moynihan and Lisa Nabieszko

A session about proven and practical models for sharing resources and collaboration.

Cluster arts management organizations are generally established as not-for-profit corporate structures. The organization provides a menu of arts management services at subsidized rates.

The cluster arts management model was developed in Ontario with the support of a multi-year public funding investment with the Canada Council for the Arts and the Ontario Arts Council. This funding commitment established the Dance Umbrella of Ontario (DUO). Subsequently, Small Theatre Administrative Facility (STAF) was formed.

The core operating value of a cluster arts management model is "first come, first served." The organization therefore does not select the clients. Therefore, an independent artist can be a guaranteed professional, highly qualified arts administrator regardless of other indicators such financial ability, merit or peer assessment.

Guest Speakers' comments

- The speakers reviewed the background of the cluster arts management model. The originating concept referred to Pentacle Arts Management in New York that was established over 25 years ago.
- The model provides an administrative support mechanism for independent artists to develop and enhance their arts management capacities. Benefits include providing subsidized professional arts administration expertise that is normally unavailable to individual artists due to the cost of contracting established expertise.
- In Ontario, several arts managers attempted to establish this mechanism without the support of public funding. Each of these organizations was unable to sustain their activity.
- In 1988 the Ontario Arts Council developed a program to support a cluster dance management organization in partnership with the Canada Council for the Arts (a three-year pilot project). The Canada Council for the Arts subsequently expanded the program to support dance umbrellas in Vancouver and Montreal.
- In 1991, Lisa Nabiesko completed a survey for the OAC Theatre Office in order to establish a theatre-based umbrella program at the OAC.
- DUO and STAF have successfully provided arts administration services in their designated jurisdictions for over ten years.
- Lisa presented examples of other models including cross-disciplinary models. Both Lisa and Christine have undertaken regional surveys predicated on establishing regional cross-disciplinary models.
- Both organizations continue to address the constituents' needs. STAF now provides fundraising services and DUO provides tour marketing. Both organizations reported that they have become more involved in the management of the clients' business rather than a menu-driven service system that established the organizations.
- The operational challenges of the cluster management model follow:
    a. The model requires a multi-year funding commitment from the public arts funders.
    b. The artists and/or arts organizations must demonstrate a commitment to support this type of service organization.
    c. Time management challenges resulting from multiple requests from the clients.
    d. Operating policies/principles must be defined to ensure equitable service delivery.

e. This model has demonstrated that the function can support some, but not all of the administrative needs of the artist (such as Board management/development).
f. The client relationship must be established with the organization, not the organization's employees/sub-contractors.
g. The artist (client) is responsible for the writing of the grant materials to ensure the articulation of artistic vision and practice is distinct and unique.
h. The service request or need is larger than the human resource capacity of the organization. Therefore, the organization must establish its limitations to ensure quality and effectiveness of service.

In the group discussion, participants noted the following:

- The opportunity for local artists to share resources and gain access to professional arts administration is worthy for continued discussion.
- This type of organization requires public arts funding in order to get started and to be sustained.
- The examples/models that were discussed support performance-based arts practices and, therefore, a different model/system for writers, visual artists, etc. Would have to be explored.
- Various capacity-building grant programs available to Ontario artists/arts organizations could support the necessary research and initial funding for this type of service organization.

Concluding observations:

- DUO and STAF have changed the arts landscape in their jurisdictions ensuring that individual artists and small-scale arts organizations have a greater understanding of the business of the arts.
- Both organizations have contributed to their constituents' capacities and abilities to access opportunities that support their artistic missions and activities.
- As a service organization model, the role is one of animator and facilitator that generate opportunities for artists.
-

D4 – Designing and Implementing an Internship Program – led by Karen Ennis, Bob Johnston and Catherine Smalley

A workshop to explore the design and implementation of an internship program.

Catherine Smalley from the Metcalf Foundation, a private family foundation that provides programming in the performing arts, the environment and communities, described the Metcalf Internship Program.

The Metcalf Internship Program supports training and professional development for artists, administrators and production staff in the performing arts. The program is intended to provide meaningful training for the interns and is not meant to replace or augment staff within an organization.

The budget is about $400,000 a year, funding 20 to 24 internships. A feature in the reporting follow-up is a yearly meeting of interns that allows them to exchange stories and ideas and to forge connections giving the foundation another measurement tool.

Applications from arts organizations are evaluated by a committee from the arts community, which makes recommendations to the Metcalf Foundation Board; results are available two months after the application deadline.

Full details on the internship program and other Metcalf Foundation arts programs are available at http://www.metcalffoundation.com/intern.html.

Karen Ennis and Bob Johnston from Cultural Careers Council Ontario described the Youth Wage Subsidy and the Income Managers programs. The CCCO's programming is funded through various levels and departments of government.

The Youth Wage Subsidy Program helps youths (30 years or younger) to improve their prospects in the cultural sector. Half of the wages are the responsibility of the participating arts organization; the CCCO pays the other half. Eighty-seven interns have been engaged over the past four years in internships that last between 4 and 10 months.

The applications are judged by a jury from the community that makes decisions based on the ability of the arts organization to provide a good experience for the intern and on the capacity of the organization to carry out an internship program. Information about the program is available at http://www.workinculture.on.ca.

The Income Managers Program combines seven weeks in the classroom (at the University of Waterloo) with on-the-job experience in fundraising and marketing at arts organizations. Unlike in the Youth Wage Subsidy program, the applicants are assessed, rather than the arts organizations, and they must have some experience in the arts. Most of the successful graduates find placements in the cultural sector. Funding for the 2005–06 program has not yet been confirmed, but more information about the program is available at http://www.workinculture.on.ca.

D5 – Recruitment and Selection – led by Nina Small

A workshop offering practical information for successful recruitment and selection as well as legal pitfalls to avoid.

Session leader presentation is in borders, recorder notes are noted as addendum:

Recruitment and Selection
Re-Generation Conference
Presented by, Nina Small

re·cruit·ment
Pronunciation: ri-'krüt-m&nt Function: *noun*
1 : the action or process of recruiting
2 : the process of adding new individuals to a population or subpopulation (as of breeding individuals) by growth, reproduction, immigration, and stocking; *also* : a measure (as in numbers or biomass) of recruitment

Objectives

- Basics of Recruitment and Selection Processes
- Interview and reference checking pointers
- Human Rights Code as it applies to hiring

Recruitment and Selection

- Recruitment is the process of attracting the right individuals with the required skill sets, experience and qualities to perform the position for which you are hiring
- Selection is a process designed to help you choose the best person for the position
- Once the individual is on the job you need to think of retaining and motivating

Recruitment Options

- There are many recruitment options, however some can be quite expensive.
- Carefully consider what avenues will provide you with the best return for your investment, your time and your human resources.
- For a minimal markup, consider advertising companies.
- Most expensive and inflexible:
  - Newspapers, local community papers, and papers and magazines with a specific readership
- Moderately expensive and flexible:
  - Internet job boards like Monster.com, Workopolis, Charity Village and list serves
- Least expensive and most flexible:
  - Free Internet job boards, job boards within organizations, trade list serves, school career centres, employment centres, and of course, word of mouth
- CCCO's Work in Culture Web site, www.workinculture.on.ca
- CHRC's Culture Works Web site, www.cultureworks.ca

ADDENDUM NOTES

- Take the time to find out what type of person you are seeking for the best fit.
- Ensure that the job description is up to date.
- Sample job descriptions are on the CCCO Web site at www.workinculture.com.
- The whole process can take two months from posting.
- Posting should be live for three weeks.
- Allow for three weeks for application deadline.
- **Other Web options:** Work In Culture (free), Cultureworks (free), Internet job boards.
- **Other options:** circulate e-mail, HRDC, Canadian Heritage Museums and Galleries (free).

Creating the Posting

- At a minimum, the job posting should include the title of the position, how the person should submit an application and the submission deadline

- Better chance of getting qualified individuals by identifying the skill sets, experience and behaviours required
- Good opportunity to express organization's priorities
- Show organization's work culture

ADDENDUM NOTES

- The more details the better, including non-negotiable skills required.
- Ensure that minimum requirements are valid.
- Include organization's strategic priorities in posting.
- If you won't be contacting all applicants, say so in posting.
- If applicant requests feedback, it should be provided.

Selection Process

- Create spreadsheet to log applications received, and to indicate whether they meet the required criteria
- Have hiring manager/colleague review short-listed applicants
- Select who will conduct the interviews
- Optional – pre-screen candidates by phone
- Conduct face-to-face interviews, 1st and 2nd rounds
- Use grid to rate candidates based on required areas and always keep notes
- Check references
- Offer written employment contract
- Communicate rejections

ADDENDUM NOTES

Pre-screening is optional and might include

- Identifying aspects of the job and asking the candidate by phone if that is acceptable.
- Testing for bilingualism.

Recruitment agencies:

- Are an option, but can be expensive.
- Are useful if you don't have the time to recruit yourself.
- Ensure the candidate knows how many people will be interviewing them and how long the interview will be.
- If presentation skills are required, ask the candidate to do a PowerPoint presentation.

If writing skills are required, ask the candidate to provide writing samples.

Interview Techniques

- Trends in interviewing, for example, psychological testing, stress interview, group interviews, etc.
- Preferred method – behavioural description interviews and open questions
- Avoid asking leading or closed questions
- Ask the same questions
- Only ask questions applicable to the job
- Make a good impression

ADDENDUM NOTES

Interview with someone else – another manager or selection committee.

- Ensure the interview environment is comfortable: provide water, be welcoming, and don't stand while candidate is sitting.

As interviewer, make sure you are familiar with

- Job description and skill sets being sought.
- Human Rights Code; what you can and can't ask.

General Interview Questions

- Weaknesses and strengths
- What would your references/current supervisor say about you?
- What three words would you use to describe yourself?
- What type of environment/people do you work best with?
- Describe a positive supervisory relationship...
- Why are you looking for a change in employment?

ADDENDUM NOTES

Behavioural-based questions

- Entail asking the candidate to describe an actual experience they have had relating to the topic being covered.
- Should relate to the skill sets required for the job in question.

- Typing tests can be arranged through agencies.
- Scenario question: use a real-life example of a situation and ask the candidate to write a solution down, giving them enough time.

Reference Checking

- Always check at least three references
- Make sure that one reference is a recent employer
- Ask the same questions
- Take notes
- Open-ended and non-leading questions

ADDENDUM NOTES

- Don't tell the reference too much about your organization, you don't want to feed them an answer.
- Tell the reference that, due to privacy laws, the candidate can have access to the information they provide.
- Always inform candidate that you will be checking their references.

Reference Questions

- Confirm how the reference knows the individual and for how long
- Ask about specific skill sets, and any concerns that may have arisen during the interview
- Ask whether the individual would be re-hired
- Strengths and weaknesses
- Attendance record
- Ability to get along with others
- Management style
- Anything further to add

ADDENDUM NOTES

- Best to check references between first and second interviews, giving you more material to ask about in the second interview.
- Not all organizations will participate in reference checks due to privacy laws.
- Ensure you have a signed contract before letting other candidates know they don't have the job.
- If rejected candidate asks for reason, be honest, it may help them in future.

Human Rights Code

- The grounds in the Code apply to job postings, applications, interview and reference questions
- Only items applicable to the requirements of the position should be noted, then Human Rights Code violations will be avoided
- Avoid asking personal questions at all costs
- Can ask if the candidate is able to meet the requirements of working late, travel, weekends

ADDENDUM NOTES

- If a job requires tasks you need to confirm the candidate is able to do, you can ask if they have any issues with carrying out the specific task.

Other Resources

- *CHRC's* Recruiting the Right People *booklet*
- *Developing Human Resources in the Voluntary Sector – staffing page www.hrvs-rhsbc.ca/staffing/pg001_e.cfm*
- *www.head2head.ca newsletter*
- *Charity Village news and events www.charityvillage.com*

D6 – Human Rights – led by Neil Edwards

An introductory workshop on the Ontario Human Rights Code as it affects the workplace.

What arts managers need to know about human rights in the workplace

Neil Edwards
Director, Mediation and Investigation
Ontario Human Rights Commission
February 7, 2005

Presentation outline

- Public Policy: Aims of the *Code*
- Social Areas and Grounds of the *Code*
- Discrimination
- Disability
- Importance of the *Code*
- Human Rights Commission
- Human Rights Principles
- Other Legislation
- Questions and Answers

Public policy: aims of the *Code*

The aims of the ***Code*** are:

- Support inclusion and respect
- Recognize the dignity of every person
- Promote equal rights and opportunities free of discrimination and harassment
- Full participation by all
- Remedial nature of legislation

Importance of the *Code*

- Prohibits discrimination on 16 grounds in the areas of goods, services and facilities, employment, housing, contracts, and vocational associations
- Individuals and corporations can be held vicariously liable for infringement of rights under the ***Code.***

Social areas

- Services, goods and facilities
- Occupancy of accommodation
- Contracts
- Employment
- Membership in vocational associations

Prohibited grounds

- Race
- Ancestry
- Place of origin
- Colour
- Ethnic origin
- Citizenship
- Creed
- Sex (pregnancy)
- Sexual orientation
- Same-sex partner status
- Disability
- Age
- Marital status
- Family status
- Receipt of public assistance (accommodation)
- Record of offences (employment)

Discrimination

Any practice or behaviour, whether intentional or not, which has a negative effect on an individual or group because of a prohibited ground

Harassment

- "Engaging in a course of vexatious comment or conduct that is known or ought reasonably to be known to be unwelcome"
- Prohibited in all social areas based on all *Code* grounds
- Sometimes accompanied by threatening or violent behaviour

Poisoned environment

- Based on the impact of comment(s) or action(s) on individuals rather than frequency
- Could be caused by a single comment or action
- Can result from comment(s) or action(s) of any person including a co-worker, supervisor and manager

Disability

any degree of: physical disability,
infirmity,
malformation or
disfigurement

that is caused by: bodily injury,
birth defect or
illness

and, without limiting the generality of the foregoing, includes:

- diabetes mellitus,
- epilepsy,
- a brain injury,
- any degree of paralysis,
- amputation,
- lack of physical co-ordination,
- blindness or visual impediment,
- deafness or hearing impediment, muteness or speech impediment,

or physical reliance on a:

- guide dog or
- other animal or
- on a wheelchair or
- other remedial appliance or device, a condition of mental impairment

or

- a developmental disability,
- a learning disability, or
- a dysfunction in one or more of the processes involved in understanding or using symbols or spoken language,
- a mental disorder, or
- an injury or disability for which benefits were claimed under WSIA

Duty to accommodate

- The duty to accommodate is the legal requirement for employers and service providers to proactively eliminate employment practices, standards and rules that discriminate on the basis of a prohibited ground
- This can include standards, rules and practices that may appear neutral but adversely affect certain groups

Violations of the *Code*

Violations of the ***Code*** may lead to complaints to the Commission that can be expensive due to:

- Potential of corporate liability
- Costs associated with defending a complaint
- Lower productivity
- Increase absenteeism
- High rate of employee turnover

Personal costs

- mental anguish
- physical health affected
- loss of income, job, benefits
- interruption of career
- damage to self-esteem
- damage to relationships
- isolation in the workplace

Organizational costs

- employee turnover
- retraining
- absenteeism, low morale, decreased productivity
- litigation
- increased cost of benefits
- tarnished public image

Human Rights Commission

The Ontario Human Rights Commission:

- Receives complaints and conducts investigations
- Advances human rights policy
- Produces policy and guideline resource materials
- Public education
- Public interest mandate

Human rights principles

- Discrimination need only affect one person (in a group) for a complaint to be filed
- If a ground of discrimination is only one of several reasons for a decision affecting a person, that is sufficient reason to investigate a complaint
- "Perception" that a person is covered by a ground may be enough to file a complaint

Other legislation

- *Employment Standards Act, 2000*
- *Labour Relations Act, 1995*
  - Collective agreements deemed to include non-discrimination clause
  - Arbitrators can interpret and apply ***Code***
- *Occupational Health and Safety Act*
- *Workplace Safety and Insurance Act, 1997*

Reference material

- Guide to the *Human Rights Code*
- Hiring? A Human Rights Guide
- Human Rights at Work
- If You Receive a Human Rights Complaint: A Respondent's Guide
- Pregnancy, Before, During & After: Know Your Rights
- Racial Slurs and Harassment and Racial Jokes
- Sexual Harassment and Other Comments or Actions about a Person's Sex
- Policy and Guidelines on Disability and the Duty to Accommodate
- Policy on Discrimination and Harassment because of Sexual Orientation
- Policy on Discrimination and Harassment Because of Gender Identity

- Policy on Discrimination Because of Pregnancy and Breastfeeding
- Policy on Employment-related Medical Information
- Policy on HIV/AIDS-Related Discrimination
- Policy on Racial Slurs and Harassment and Racial Jokes
- Policy on Sexual Harassment and Inappropriate Gender Related Comments and Conduct

ALL OHRC documents are available on the Web site:
www.ohrc.on.ca

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